

ORD MINNETT

David James Campbell

Private Wealth Adviser

Building wealth for generations

Ord Minnett is an Australian owned advice and investment services firm.

We offer financial advice and investment management for individuals, families, businesses and organisations, enabling them to protect and grow their wealth.



David Campbell

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Qualifications

- Diploma of Stockbroking, Stockbrokers and Investment Advisers Association & Deakin University
- Diploma of Financial Markets, Stockbrokers and Investment Advisers Association & Deakin University
- Bachelor of Business (Economics & Finance), RMIT University

Certifications

- Accredited Derivatives Adviser Level 1 & 2
- Superannuation
- Margin Lending

Areas of Advice

- Asset allocation
- Investment strategies
- Superannuation & SMSF

Background

David brings 36 years of experience in the stockbroking industry with a focus on private client and wealth management since 1998. He primarily advises wealthy individuals with extensive investments spanning Australian and international direct equities, wholesale fixed interest, and listed and unlisted funds.

David facilitates access to global equities, fixed interest, and alternative investments through personalised strategic and tactical advice. His clients invest through self-managed super funds (SMSFs), family trusts, corporate entities, and personal accounts, both directly and via platforms. David aims to simplify the investing experience by filtering out market noise and distractions, focusing on current and future priorities to help clients achieve their financial goals.

David's advice is straightforward, striving to demystify complex financial concepts.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research