

ORD MINNETT

David Julian

Investment 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 Julian

Investment Adviser

D: 03 9602 9236
T: 03 9608 4111
E: djulian@ords.com.au

Ord Minnett
Level 22
35 Collins Street
Melbourne VIC 3000
ords.com.au

Qualifications

- Bachelor of Arts
(Economics & Japanese),
University of Melbourne
- Bachelor of Science
(Chemistry),
University of Melbourne

Areas of Advice

- Asset allocation
- Investment Advice
- Investment strategies
- Life risk insurance

David brings more than three decades of international and Australian investment advisory experience. His career commenced as a Japanese Equity Analyst in London and Tokyo, returning to Australia in 1993. Joining E.L. & C. Baillieu in 2006, David continues to provide his extensive expertise to clients following its integration with Ord Minnett in 2022.

David cultivates long-standing, trusted relationships with his clients, specialising in the establishment and management of direct share portfolios for professional and sophisticated investors. A core focus of his practice is assisting self-funded retirees in securing a consistent and reliable retirement income stream.

David delivers conservative investment counsel, often emphasising low-risk income generation. He also collaborates regularly with financial planners, accountants, and solicitors, offering direct share advisory and assistance with share-related estate matters.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research