

ORD MINNETT

Dylan Viney

Senior 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.



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Qualifications

- Graduate Diploma of Legal Practice, University of Tasmania
- Diploma of Financial Planning, Kaplan Professional
- Bachelor of Business (Finance) and Bachelor of Laws, University of Tasmania

Certifications

- Accredited Derivatives Adviser Level 1 & 2
- Foreign Exchange Accreditation Program, Stockbrokers and Investment Advisers Association

Areas of Advice

- Asset allocation
- Investment strategies
- Securities
- Derivatives
- Superannuation & SMSF
- Retirement planning

Background

After qualifying as a lawyer, Dylan gained valuable experience in the UK, trading currencies and managing foreign exchange volatility for his clients. Returning to Australia in 2016, he transitioned to financial advisory, initially joining JBWere before moving to Ord Minnett in 2023.

Dylan brings a unique blend of legal and financial expertise, providing clients with comprehensive investment strategies. His experience encompasses asset allocation, complex derivatives, and a range of listed products and managed funds. Dylan is dedicated to helping clients navigate the intricacies of the financial markets, offering tailored advice for retirement planning and gearing strategies.

He aims to provide clear, strategic guidance, empowering clients to make informed decisions and achieve their long-term financial goals through personalised planning and investment strategy.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research