ORD MINNETT

Frank Cerra

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.

Frank Cerra

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Qualifications

- Diploma of Financial Services, FINSIA

Certifications

- Margin Lending
- Self-Managed Super Funds (SMSFs), Tribeca

Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies
- Life risk insurance
- Superannuation & SMSF

Background

Frank is a Private Wealth Adviser with more than 17 years of experience in financial advice. He specialises in a top-down management approach to asset allocation and portfolio construction, with a particular expertise in ongoing full-service portfolio management.

Frank's clients include high net worth retail clients, institutional investors, and professional and sophisticated investors, with whom he has cultivated long-standing and trusted relationships. His main areas of expertise encompass portfolio construction, superannuation, and wealth transition management.

Frank provides comprehensive advice on Australian and international equities, fixed interest, bonds, managed investments, and the construction and management of self-managed super funds (SMSFs).

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research