ORD MINNETT

Ian Warner

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.

Ian Warner

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Qualifications

- Diploma of Financial Planning, RMIT University
- Professional Diploma in Stockbroking, Deakin Prime
- Bachelor of Economics, Monash University

Certifications

- Certified Financial Planner (CFP), Financial Planning Association of Australia
- Accredited Derivatives Adviser Level 1
- Margin Lending
- Superannuation

Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies
- Retirement planning
- Superannuation & SMSF

Background

Based in Melbourne, Ian is a seasoned Private Wealth Adviser serving clients primarily across Victoria and Australia.

With more than two decades of experience providing investment advice, Ian began his career at the Commonwealth Bank before transitioning to stockbroking roles at E.L.& C Baillieu's and now Ord Minnett. His primary focus is on achieving sustainable growth in client wealth while also addressing their specific income requirements, working in close collaboration with other professional advisers supporting each client's unique needs. Ian's extensive expertise lies in share market investing, underpinned by his long-standing experience and a strong foundation in financial planning.

This comprehensive approach ensures that clients thoughtfully consider all facets of superannuation and wealth transition within their overall financial strategies, aiming for both prosperity and long-term security.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research