James Legoe

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

- Bachelor of Commerce, University of Melbourne
- Bachelor of Engineering (Civil with Honours), University of Melbourne

Certifications

- Chartered Financial Analyst, CFA Institute
- Accredited Derivatives Adviser Level 1 & 2

Areas of Advice

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

Background

With more than 20 years of experience in finance, James began his career as an Investment Adviser at a major global investment bank before joining Ord Minnett in 2009.

As a Level 1 & 2 Accredited Options Adviser, James provides expert advice on equities, options, and other derivative products. CFA-qualified, he specialises in developing investment strategies within a comprehensive asset allocation framework.

By leveraging both top-down and bottom-up research, James crafts personalised portfolios that align with clients' unique financial objectives, risk tolerance, and long-term wealth goals.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research