ORD MINNETT

Jamie Julian

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.

Jamie Julian

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Qualifications

- Bachelor of Arts & Commerce, Monash University
- Graduate Diploma of Financial Planning, Kaplan Professional

Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies
- Life risk insurance
- Redundancy / early retirement
- Retirement planning
- Superannuation & SMSF

Background

Jamie is a Melbourne-based Private Wealth Adviser dedicated to empowering clients to achieve financial security, with a particular focus on retirement planning. He collaborates closely with his father, David Julian, an Investment Adviser at Ord Minnett with more than 30 years of industry expertise.

Jamie's areas of proficiency encompass retirement planning, superannuation, and investment strategy. He excels in developing customised investment strategies to optimise retirement income and facilitate seamless estate transitions. By staying abreast of market trends and continuously refining his approach, Jamie enables clients to make informed decisions and secure their financial future.

Committed to fostering long-term client relationships, Jamie guides clients through every stage of their financial journey, ensuring they achieve financial success and establish a lasting legacy.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research

Ord Minnett Limited ABN 86 002 733 048 (Ord Minnett) holds AFS Licence Number 237121. July 2025.