

ORD MINNETT

Jonathan Andrews

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 Applied Finance, Kaplan Professional
- Bachelor of Commerce (Economics), Deakin University
- Bachelor of Arts (Public Relations), Deakin University

Certifications

- Margin Lending
- Securities and Managed Investment
- Accredited Derivatives Adviser Level 1 & 2

Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies

Background

Jonathan has more than 15 years of experience in the wealth management sector of the financial services industry. His career began at JBWere, where he provided investment advice to private clients.

Since 2013, he has continued this work at Ord Minnett. Jonathan's expertise lies in developing comprehensive investment strategies tailored to client risk profiles, encompassing Australian and global equities, fixed income, and derivatives. He aims to provide clear and effective guidance, assisting clients in navigating the complexities of the investment landscape and achieving their financial goals.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research