

ORD MINNETT

Joseph Fedele

Senior 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

- Diploma of Financial Markets, Securities Institute of Australia
- Bachelor of Commerce, La Trobe University

Certifications

- Accredited Derivatives Adviser Level 1 & 2

Areas of Advice

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

Background

Joining Ord Minnett in 2017, Joseph brings more than 25 years of finance and wealth management experience, having held advisory roles at BNP Paribas, UBS, and Morgan Stanley. He specialises in constructing tailored portfolios to meet individual client needs, with expertise in international and domestic equities, listed credit, and derivative strategies designed to enhance income and total returns.

Joseph collaborates closely with individuals and families to develop personalised wealth management roadmaps, leveraging his proficiency in portfolio management and wealth protection. He is committed to identifying optimal financial strategies for each client, providing clear and concise advice that fosters confidence.

Adept at navigating the complex investment challenges faced by high net worth investors, Joseph accesses global solutions and expert insights to deliver superior outcomes.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research