ORD MINNETT

Luke Chiuchiarelli

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.

Luke Chiuchiarelli

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Qualifications

- Graduate Diploma of Financial Planning, Kaplan Professional
- Graduate Diploma in Applied Finance, Kaplan Professional
- Diploma of Financial Services, FINSIA
- Bachelor of Business (Financial Management & International Business), La Trobe University

Certifications

- CISI Level 3 Certificate in Securities, Chartered Institute for Securities & Investment (CISI)

Areas of Advice

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

Background

Luke is a Private Wealth Adviser based out of Melbourne, servicing clients from all walks of life around Australia and internationally. Luke specifically services high net worth individuals, business owners, and family groups and assists with setting up and managing financial structures, retirement planning, investment strategies and planning for transitionary events such as multi-generational wealth transfer.

Luke has more than 18 years' experience in financial markets in Australia, Hong Kong, New York and the United Kingdom. Luke provides wealth management advice, first focusing on creating the right financial structure and then matching investments to clients' risk tolerance and goals, while leveraging Ords' strategic and tactical asset allocation frameworks. Luke also has a particular interest and focus in stock specific research and selection via fundamental and technical analysis.

Luke's main areas of expertise are investment advice, retirement planning, superannuation and managing family group wealth and transitions. In general, Luke will start with understanding your current situation in the aim of creating a longer-term plan to be able to reach your goals and objectives. This will involve setting up the right financial structure initially, setting the investment strategy that suits you, as well as reviewing and refining it overtime where your life journey changes.

- Financial Planning
- Investment Advice & Strategy
- Portfolio Construction & Management
- Portfolio Reporting & Administration
- Superannuation & SMSF
- Stockbroking
- Retirement Planning
- Philanthropic Giving
- Investment & Market Research