

**ORD MINNETT**

# Malissa Tobias

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 Planning, Financial Planning Association of Australia
- Bachelor of Business, Victoria University

## Certifications

- Certified Financial Planner (CFP), Financial Planning Association of Australia

## Areas of Advice

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

## Background

Malissa is a Senior Private Wealth Adviser at Ord Minnett, specialising in catering exclusively to high net worth clients. She provides comprehensive resources to tackle the intricate and diverse challenges associated with managing substantial wealth. Malissa has extensive expertise in offering services to entrepreneurs, executives, professionals, and individuals with significant net worth. She possesses a comprehensive understanding of tax structures and specialises in wealth accumulation, investments, superannuation including self-managed super funds (SMSFs), as well as retirement planning.

With 25 years of experience in providing holistic financial advice, Malissa began her career in financial planning at National Australia Bank, where she provided retail advice to the bank's customers. In 2003, she joined Commonwealth Private, specialising in delivering holistic and tailored advice to executive and high net worth clients with complex wealth management needs. In 2020, she joined Perpetual, where she continued to provide holistic advice to her client base, focusing on investment and strategic advice, investment strategy, portfolio construction, and philanthropy.

In her capacity at Ord Minnett, Malissa is dedicated to serving as a trusted adviser for her clients, cultivating honest and meaningful relationships while delivering an exceptional level of service to help them achieve their goals and objectives.



Financial Planning



Portfolio Reporting & Administration



Retirement Planning



Investment Advice & Strategy



Superannuation & SMSF



Philanthropic Giving



Portfolio Construction & Management



Stockbroking



Investment & Market Research