

ORD MINNETT

Oscar Howard

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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M: 0401 499 884
D: 03 9608 4114
E: ohoward@ords.com.au

Connect with me on [LinkedIn](#)

Ord Minnett
Level 22
35 Collins Street
Melbourne VIC 3000
ords.com.au

Qualifications

- Advanced Diploma of Financial Services (Financial Planning), Kaplan Professional
- Bachelor of Commerce, The University of Melbourne

Certifications

- SMSF Specialist Adviser, SMSF Association

Areas of Advice

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

Background

Having started work in the financial services sector in 2000, Oscar has 25 years' experience across a variety of roles and organisations, including at Perpetual Private, ANZ Private, Commonwealth Private, AXA Australia, as well as a number of smaller financial services and stockbroking firms.

As a Senior Private Wealth Adviser at Ord Minnett, Oscar provides high net worth clients with strategic advice to build and protect their wealth. His approach is based on a deep understanding of each client's unique needs and aspirations. This advice is not only implemented but also continually monitored to ensure clients stay on track.

Offering a holistic wealth management approach at Ord Minnett, Oscar ensures that specialists from all relevant advice areas collaborate to create a comprehensive, fully integrated financial plan.



Financial Planning



Portfolio Reporting & Administration



Retirement Planning



Investment Advice & Strategy



Superannuation & SMSF



Philanthropic Giving



Portfolio Construction & Management



Stockbroking



Investment & Market Research