

ORD MINNETT

Shiva Vemula

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.



Shiva Vemula

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Qualifications

- Bachelor of Commerce (Accounting & Finance), Monash University

Certifications

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

Areas of Advice

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

Background

Shiva is a highly experienced strategic Senior Private Wealth Adviser with over 12 years of expertise in advising high net worth clients.

With previous experience at Ernst & Young, KPMG, CBA Private, and Perpetual Private, Shiva has developed a proven track record for navigating and resolving complex financial situations, with the sole focus on delivering the best possible result for his clients. This is more important than ever in an ever-changing tax and legislative environment, where Shiva ensures his clients benefit from the strategic use of tax policy and government legislation to enhance wealth protection and capital growth attributes.

Leveraging his accounting background, he specialises in asset structuring and capital allocation strategies, providing comprehensive solutions that cover a client's entire wealth structure, including asset protection, estate planning, succession, and tax optimisation.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research