

ORD MINNETT

Simon Power

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.



Simon Power

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Qualifications

- Graduate Diploma of Applied Finance and Investment, FINSIA
- Professional Diploma in Stockbroking, Deakin Prime
- Bachelor of Arts, Monash University

Certifications

- Company Directors Course, Graduate of the Australian Institute of Company Directors (GAICD)

Areas of Advice

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

Background

Commencing his career with National Australia Bank in 1995, Simon spent two formative years (1998-2000) in London with global investment banks JP Morgan Chase & Co. and Goldman Sachs. Since 2000, Simon has delivered tailored investment advice through F W Holst & Co., E.L. & C. Baillieu, and Ord Minnett. Simon brings three decades of financial services expertise, spanning wealth management, stockbroking, institutional equities, and foreign exchange.

Simon advises private clients, small-to-medium business owners, family offices, self-managed super funds (SMSFs), and not-for-profit organisations. His specialisations include asset allocation, portfolio construction and management, investment strategy, and financial and retirement planning.

Simon is committed to cultivating long-term, trusted client relationships, collaborating closely to optimise investment structures and strategies, and enabling clients to achieve their financial and lifestyle aspirations. He is also a Master Practitioner of the Stockbrokers and Investment Advisers Association (SIAA).



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research