ORD MINNETT

Simon Wood

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

- Graduate Diploma of Applied Finance and Investment, Securities Institute of Australia
- Bachelor of Behavioural Science (Honours), La Trobe University

Certifications

- Accredited Derivatives Adviser Level 1 & 2
- Margin Lending
- Superannuation

Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies
- Retirement planning
- Superannuation & SMSF

Background

Simon brings 16 years of dedicated financial advisory experience to high net worth clients, cultivating a profound understanding of wealth management's intricate nuances. He anchors his counsel in a structured asset allocation framework, ensuring each client's financial blueprint is built upon a robust and personalised strategy.

Simon's expertise lies in discerning optimal investments within this framework, meticulously aligning with each client's unique financial objectives. Whether strategising for retirement, fostering investment growth, or safeguarding wealth, Simon delivers bespoke strategies tailored to individual aspirations. His approach is rooted in trust, transparency, and a steadfast commitment to comprehending client needs.

Offering comprehensive advice across wealth management, tax efficiency, and risk mitigation, Simon provides clear, actionable guidance to facilitate informed decision-making. By staying attuned to market trends and applying sound financial principles, he empowers clients to construct a secure and prosperous financial legacy.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research