

ORD MINNETT

Stephen Emmerson

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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Certifications

- Margin Lending
- Accredited Derivatives Adviser Level 1

Areas of Advice

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

Background

Stephen brings more than 40 years of comprehensive financial experience, with a focus on wealth management and delivering tailored investment solutions to clients. His career includes tenure with prestigious US and European-managed firms, providing him with a robust global perspective that he now applies at an Australian-owned firm.

Stephen specialises in the meticulous construction of personalised portfolios, aligning with each client's distinct financial objectives. These portfolios are strategically designed to address both immediate and long-term financial requirements, ensuring a customised and forward-thinking approach to wealth management. Leveraging his profound understanding of global financial markets and a client-centric philosophy, Stephen empowers clients to achieve their financial aspirations with confidence.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research