

ORD MINNETT

Stephen Fulton

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 Financial Planning, Kaplan Professional
- Professional Diploma in Stockbroking, Deakin Prime
- Bachelor of Civil Engineering, Melbourne University

Certifications

- Margin Lending
- Superannuation

Areas of Advice

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

Background

Stephen offers forty years of seasoned expertise in private client advisory, commencing his career with McKinley Wilson Stockbrokers. He has since held key positions at FW Holst, E.L. & C. Baillieu, and currently serves at Ord Minnett.

Stephen employs a data-driven, scientific methodology to share market investing, leveraging analysis accumulated over 26 years. His investment strategy integrates price momentum with value principles, focusing on small growth stocks, listed investment companies, and gold bullion. This blended asset allocation approach aims to reduce portfolio volatility compared to traditional blue-chip strategies, providing clients with a more stable investment experience while pursuing growth.

Stephen's disciplined, analytical approach fosters client confidence in navigating market fluctuations.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research