

ORD MINNETT

Stephen Godfrey

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

- Master of Applied Finance
- Graduate Diploma of Financial Planning
- Bachelor of Commerce
- Bachelor of Business Management

Certifications

- Certified Financial Planner (CFP)

Areas of Advice

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

Background

Stephen brings a decade of wealth management expertise, beginning his career at E.L. & C. Baillieu in 2017 as Head of Investments and Advice. Following Ord Minnett's acquisition of E.L. & C. Baillieu, he transitioned to direct private client advisory. His career encompasses both boutique firms and private banks, where he has delivered specialised wealth advice to high net worth families, senior executives, professionals, and business owners.

Stephen's expertise lies in the construction and management of multi-asset portfolios, employing a strategic and structural approach to wealth management. He collaborates with clients to optimise capital allocation, superannuation, and entity structuring, including trusts and companies. As a member of the Ord Minnett Multi-Asset Investment Committee, he ensures personalised advice aligned with clients' investment goals and long-term financial security.

Stephen also coordinates with clients' wider advisory teams to develop comprehensive, holistic financial strategies.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research