ORD MINNETT

Steven Marino

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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M: 0412 333 648
D: 03 9608 4128
E: smarino@ords.com.au

Ord Minnett
Level 22
35 Collins Street
Melbourne VIC 3000
ords.com.au

Qualifications

- Graduate Diploma of Financial Planning, FINSIA
- Bachelor of Business (Accountancy), Queensland University of Technology
- Bachelor of Laws (Honours), Queensland University of Technology

Certifications

- Accredited Derivatives Adviser Level 1 & 2
- Legal Practice Management Course, College of Law NSW
- Certified Financial Planner (CFP), Financial Planning Association of Australia

Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies
- Life risk insurance
- Redundancy / early retirement
- Superannuation & SMSF

Background

Steve began his career as a lawyer, specialising in commercial, banking, and finance law in both Australia and the UK. Before joining Ord Minnett as a Senior Private Wealth Adviser in 2023, he played a crucial role in developing the Strategic Financial Planning business in Queensland during an 18-year tenure at JBWere.

Steve's expertise extends to entity structuring for trusts, superannuation, and companies, asset protection, self-managed super funds (SMSFs) and comprehensive estate planning. He also excels in complex strategic planning for asset accumulation, cash flow management, and succession planning, alongside investment management, portfolio construction, and direct domestic and global equities management.

His use of option strategies for portfolio protection and income generation further demonstrates his comprehensive skill set.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research

Ord Minnett Limited ABN 86 002 733 048 (Ord Minnett) holds AFS Licence Number 237121. July 2025.