

ORD MINNETT

Tony Paterno

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 in Financial Planning, FINSIA
- Bachelor of Science, Monash University

Certifications

- Accredited Derivatives Adviser Level 1 & 2

Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies
- Redundancy / early retirement
- Retirement planning
- Superannuation & SMSF

Background

Tony has been with Ord Minnett for over 25 years and holds a Bachelor of Science from Monash University along with a Graduate Diploma in Financial Planning.

A two-time winner of Stock Picker of the Year at the Australian Stockbrokers Awards, he is widely recognised for his expertise and is frequently featured in national newspapers such as the *Sunday Herald Sun* and *The Age*.

Tony specialises in helping clients achieve their financial goals across both asset accumulation and retirement phases. He provides tailored investment advice across a range of asset classes, including direct shares, managed funds, property, fixed interest, and cash. With a focus on strategic portfolio construction, Tony develops customised strategies based on each client's individual circumstances, risk profile, and long-term financial objectives, ensuring a personalised and results-driven approach. He is also a Master Practitioner Member of the Stockbrokers and Investment Advisers Association (MSIAA).



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research