

ORD MINNETT

Trevor Davidson

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 Applied Finance
- Bachelor of Commerce
- Bachelor of Arts

Certifications

- Professional Diploma in Stockbroking

Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies
- Superannuation & SMSF
- Margin lending
- Securities & managed investments

Background

Trevor is a highly experienced Private Wealth Adviser at Ord Minnett, with nearly 20 years of expertise in wealth management, portfolio construction, and strategic financial advice. He works closely with clients across domestic and international equities, fixed interest, hybrids, cash, and managed funds, specialising in long-term wealth creation and preservation.

Trevor began his career in 1996 at JBWere before joining F W Holst & Co in 2006, which later merged with E.L. & C. Baillieu and became Ord Minnett in 2020. He has built a reputation for his consultative approach, tailoring investment strategies to clients' unique financial goals. With a strong focus on self-managed super funds (SMSFs), corporate finance, and margin lending, Trevor delivers personalised, reliable advice, helping clients navigate market challenges and achieve financial security for future generations.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research