

ORD MINNETT

Debra Huntley

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

- Post Graduate Diploma, CPA Australia
- Post Graduate Diploma, Securities Institute of Australia
- Diploma in Financial Markets, Securities Institute of Australia
- Bachelor of Commerce, James Cook University

Areas of Advice

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

Background

Debra is a seasoned Stockbroker and Private Wealth Adviser, bringing an impressive 43 years of experience to the financial industry.

Throughout her extensive career, she has cultivated enduring relationships with her clients, many of whom consistently recommend her services to their families. Debra's success is built upon her deep expertise in share selection, exchange traded funds (ETFs), a strong focus on value investing principles, and a particular skill in assisting retirees in achieving their desired income levels. She provides thorough guidance on self-managed super funds (SMSFs) and the development of tailored individual investment strategies. With a practical and common-sense approach, Debra customises investment portfolios to align with the unique needs of clients across all age groups and diverse financial circumstances.

Clients benefit from Debra's extensive skills in areas such as stockbroking, insightful investment advice, specialisation in self-managed SMSFs and individual investment strategies, skilled share selection, a focus on value investing, retirement income planning, and effective portfolio management.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research