

**ORD MINNETT**

**Geoffrey Foley**

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.



# Geoffrey Foley

Senior Private Wealth Adviser

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## Qualifications

- Professional Diploma in Stockbroking, Stockbrokers Association of Australia
- Associate Degree in Commerce, University of Southern Queensland

## Certifications

- SDIA Accreditation Program Assessment, Securities & Derivatives Industry Association
- Accredited Derivatives Adviser Level 1 & 2
- Margin Lending

## Areas of Advice

- Asset allocation
- Investment strategies
- Superannuation & SMSF

## Background

Geoff brings a wealth of experience to the financial services industry, commencing his career as an Accountant with Ernst & Young from 1993 to 1995. He further developed his skills as a Dealer's Assistant for Charles Stanley in the UK from 1995 to 1999.

Upon returning to Australia, Geoff held significant roles at Credit Suisse (2000-2003) and Morgans (2003-2015), before contributing his expertise to Morgan Stanley from 2015 to 2019. In 2020, Geoff joined Ord Minnett, where he continues to deliver expert financial guidance. Throughout his career, Geoff has consistently shown a dedication to excellence and a strong grasp of market dynamics.

Geoff's key strengths include comprehensive financial advice, skilled portfolio management, strategic guidance on superannuation and self-managed super funds (SMSFs), and the implementation of effective asset allocation strategies.



Financial  
Planning



Portfolio Reporting  
& Administration



Retirement  
Planning



Investment Advice  
& Strategy



Superannuation  
& SMSF



Philanthropic  
Giving



Portfolio Construction  
& Management



Stockbroking



Investment &  
Market Research