

**ORD MINNETT**

**James Kaluschke**

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.



# James Kaluschke

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## Qualifications

- Diploma of Financial Planning, Kaplan Professional
- Bachelor of Commerce (Finance), The University of Queensland

## Certifications

- Accredited Derivatives Adviser Level 1 & 2

## Areas of Advice

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

## Background

James has been working in the wealth management industry for over a decade and became a registered Financial Adviser in 2018. Prior to joining Ord Minnett, he cultivated a deep understanding of financial markets and refined his client relationship management skills at Morgan Stanley.

At Ord Minnett, James collaborates with a diverse clientele, including institutional investors, high net worth individuals, and not-for-profit organisations. He specialises in providing tailored asset allocation advice, skillfully navigating multi-asset and multi-currency portfolios to ensure each client achieves their unique investment goals and objectives with both precision and strategic insight.

James is deeply committed to delivering exceptional service and fostering long-term financial success for his clients through proactive and highly personalised advice, ensuring their portfolios are strategically positioned to meet their specific needs within the broader landscape of investment services and the nuanced requirements of high net worth and institutional client advisory.



Financial  
Planning



Portfolio Reporting  
& Administration



Retirement  
Planning



Investment Advice  
& Strategy



Superannuation  
& SMSF



Philanthropic  
Giving



Portfolio Construction  
& Management



Stockbroking



Investment &  
Market Research