ORD MINNETT

John Erzetich

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

- Professional Diploma of Stockbroking, Stockbrokers Association of Australia
- Bachelor of Business, Queensland University of Technology

Certifications

- Accredited Derivatives Adviser Level 1 & 2

Areas of Advice

- Deposit and payment products
- Managed discretionary account services
- Margin lending
- Redundancy / early retirement
- Retirement planning
- Securities
- Superannuation & SMSF

Background

John Daniel Erzetich began his distinguished career on the bustling trading floor of the Brisbane Stock Exchange, gaining invaluable first-hand experience in navigating the volatile market cycles even before the significant 1987 crash.

With decades of deep expertise in the financial markets, he has cultivated a profound understanding of their inherent complexities and constantly evolving dynamics. John's client-centric approach is built upon a foundation of trust, a genuine understanding of each client's unique needs, and the consistent delivery of bespoke financial solutions. As a dedicated custodian of his clients' wealth, he meticulously tailors adaptable strategies for effective wealth creation, ensuring they evolve in tandem with their changing goals and various life stages.

John provides personalised guidance to a diverse clientele, including private individuals, corporations, family offices, and foundations, all aimed at helping them achieve their wide-ranging financial objectives through comprehensive financial advice, expert stockbroking services, strategic wealth management, and diligent portfolio management.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research