ORD MINNETT

John Marr

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

- Diploma of Financial Planning, Deakin University
- Bachelor of Arts, University of Queensland

Areas of Advice

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

Background

John has more than 30 years of experience in the financial services industry as a stockbroker and private wealth adviser. Throughout his extensive career, he has cultivated close working relationships with numerous clients, guiding them in the growth of their investments and overall wealth across a diverse range of asset classes and various investment vehicles.

His core expertise is firmly centered on the effective management of both superannuation funds and investment portfolios, with a particularly strong emphasis on strategic asset allocation and meticulous portfolio construction techniques designed to optimise returns and manage risk.

John is deeply committed to delivering exceptional customer service, actively engaging in the analysis of prevailing market trends and their potential impact on client portfolios, all with the overarching goal of helping them achieve their specific financial and lifestyle aspirations through his deep understanding of superannuation and investment portfolio management, strategic asset allocation, and robust portfolio construction. John's key areas of focus for his clients include the effective management of superannuation and investment portfolios, strategic asset allocation, and portfolio construction.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research