

**ORD MINNETT**

**Laurence Crawley**

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.



# Laurence Crawley

Senior Private Wealth Adviser

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## Qualifications

- Diploma of Financial Planning, Deakin University

## Certifications

- Accredited Derivatives Adviser Level 1 & 2

## Area of Advice

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

## Background

Laurence joined Ord Minnett in 1998, bringing with him 10 years of experience in various roles within the financial services industry.

Over the years, he has built a diverse client base, typically requiring advice on private superannuation and pension funds, as well as private foundations and ancillary funds. Laurence takes a hands-on approach with his clients, guiding them through the establishment of effective financial structures to maximise their investment potential. Once these foundations are in place, he actively engages with clients, advising on and managing their portfolios to ensure alignment with their long-term financial goals.

For those he advises, Laurence's core areas of expertise include superannuation and self-managed super fund (SMSF) strategies, retirement planning, providing comprehensive investment services, and delivering tailored financial planning for foundations and ancillary funds. He is also a member of the Stockbrokers and Investment Advisers Association (SIAA).



Financial  
Planning



Portfolio Reporting  
& Administration



Retirement  
Planning



Investment Advice  
& Strategy



Superannuation  
& SMSF



Philanthropic  
Giving



Portfolio Construction  
& Management



Stockbroking



Investment &  
Market Research