

ORD MINNETT

Jennifer Wikman

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

- Master of Financial Planning, Kaplan Professional
- Bachelor of Arts (Mathematics), University of QLD

Areas of Advice

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

Background

Jen joined Ord Minnett in 2014 and focuses her expertise on developing tailored strategic and structural advice to empower clients in achieving their financial and lifestyle goals.

She is dedicated to providing exceptional customer service and fostering long-term, strong relationships with those she advises. With a core focus on superannuation and self-managed super funds (SMSFs), reflecting her understanding of their critical role in long-term wealth creation and ensuring a comfortable retirement, Jen collaborates closely with clients to facilitate wealth growth through strategic asset allocation and effective investment diversification. She is also an experienced personal risk insurance specialist, with a particular focus on delivering financial protection solutions for clients with young families.

Individuals working with Jen can benefit from her comprehensive skills in superannuation and SMSFs, strategic asset allocation and investment diversification.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research