

ORD MINNETT

Paul Davies

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

- Bachelor of Commerce, University of Wollongong

Certifications

- Certified Financial Planner (CFP), Financial Planning Association of Australia
- Accredited Derivatives Adviser Level 1 & 2

Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies
- Retirement planning
- Superannuation & SMSF

Background

Paul is a Senior Private Wealth Adviser with more than 14 years of experience in providing comprehensive financial planning and tailored investment advice to private clients.

His clients include high net worth individuals and families, retirees, business owners, and corporate executives. Paul specialises in crafting retirement planning, superannuation, and portfolio management solutions specifically designed to preserve and grow substantial assets. With a deep understanding of both financial planning principles and effective investment strategies, he is dedicated to providing personalised advice that directly aligns with each client's unique long-term financial goals and desired lifestyle.

Paul is committed to delivering exceptional advice and strategic guidance, consistently focusing on achieving tangible results and ensuring the long-term financial success of his clients.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research