

**ORD MINNETT**

**David Wallis**

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.



# David Wallis

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## Qualifications

- Graduate Diploma of Finance and Investment
- Diploma of Financial Planning
- Bachelor of International Finance

## Certifications

- Self-Managed Super Funds (SMSF) Specialist
- Accredited Derivatives Adviser Level 1 & 2

## Areas of Advice

- Asset Allocation
- Financial Advice
- Investment Strategies
- Retirement Planning
- Superannuation & SMSF

## Background

David has been providing investment and financial strategy advice for 25 years. He has previously worked with Macquarie Group, ABN Amro Morgans and MLC.

Specialising in portfolio management and retirement planning, David develops tailored investment and wealth creation strategies aligned with each client's objectives and risk tolerance. He values the relationship between adviser and client, with a focus on achieving long-term investment and lifestyle goals.

Outside of work, David is actively involved in the community. He supports several local clubs, including Broadbeach AFL, and serves as President of the Mermaid Beach SLSC Supporters Club.



Financial  
Planning



Portfolio Reporting  
& Administration



Retirement  
Planning



Investment Advice  
& Strategy



Superannuation  
& SMSF



Philanthropic  
Giving



Portfolio Construction  
& Management



Stockbroking



Investment &  
Market Research