

**ORD MINNETT**

**Alex Faulkner**

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.



# Alex Faulkner

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## Qualifications

- Bachelor of Business (Finance), Queensland University of Technology
- Graduate Diploma of Financial Planning

## Areas of Advice

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

## Background

Raised on the Gold Coast, Alex has been researching and investing in financial markets since 2016, building several models for himself and clients. Alex joined Ord Minnett in 2020, before successfully completing his qualifications and becoming a registered Private Wealth Adviser in 2023.

Alex provides superannuation and personal investment advice for Queensland professionals. This comes in the form of tailored investment strategies to meet the goals of each individual. Alex is dedicated to a great service offering while using index tracking and high conviction stock picking to out-perform the market.

The investment options that Alex utilises includes: Australian & International Shares, Fixed Interest Securities, Exchange Traded Funds (ETFs) and Australian Bonds.

Alex fulfills the need for Queensland professionals as they struggle to find time to manage their own investments. Investment structures can be in the form of personal funds, trusts and personal superannuation.

At his fingertips, Alex has the expertise of the Ord Minnett Research team, including the institutional desk. Ords' Corporate Finance team also provides corporate transactions, such as IPOs, which add further value for clients.

Alex also assists solicitors on the Gold Coast for estate administration services with shares involved.

In his free time, Alex enjoys playing sport and going to the gym.



Financial  
Planning



Portfolio Reporting  
& Administration



Retirement  
Planning



Investment Advice  
& Strategy



Superannuation  
& SMSF



Philanthropic  
Giving



Portfolio Construction  
& Management



Stockbroking



Investment &  
Market Research