ORD MINNETT

Lonni Aylett

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.

Lonni Aylett

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Qualifications

- Diploma of Financial Planning, Deakin University
- Bachelor of Economics (Social Sciences), The University of Sydney

Certifications

- Life Risk Specialist, Financial Planning Association of Australia

Areas of Advice

- Financial advice
- Financial structuring
- Superannuation & SMSF
- Retirement & estate planning
- Testamentary trust investment management & administration
- Investment strategies
- Asset allocation
- Life risk insurance

Background

With over twenty years of experience at Ord Minnett, Lonni is known for delivering exceptional, high-touch service to clients seeking premium advice without the need for a dedicated family office.

Lonni specialises in growing wealth while carefully managing risk. She is highly regarded for her diligence, creativity, and technical expertise. Supported by a stable and dedicated team, Lonni provides a highly client-focused service, building long-term relationships based on trust, reliability and care.

Lonni delivers comprehensive advice designed to help clients achieve their financial goals with clarity and confidence. Acting as a professional hub, Lonni and her team facilitate seamless communication between clients and their trusted advisers, such as lawyers and accountants, ensuring a cohesive approach to wealth management.

Lonni's expertise is in advising on complex deceased estates and family groups. She assists with structuring and superannuation strategies, advice on large self-managed super funds (SMSFs), testamentary trust investment management and administration, and estate planning to ensure assets are protected and transferred effectively.

Her investment management strategies focus on optimising portfolios to provide the right balance between income generation and long-term growth.

- Financial Planning
- Investment Advice & Strategy
- Portfolio Construction & Management
- Portfolio Reporting & Administration
- Superannuation & SMSF
- Stockbroking
- Retirement Planning
- Philanthropic Giving
- Investment & Market Research

Ord Minnett Limited ABN 86 002 733 048 (Ord Minnett) holds AFS Licence Number 237121. July 2025.