

**ORD MINNETT**

**Troy Derwin**

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.



# Troy Derwin

Senior Private Wealth Adviser

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## Qualifications

- Graduate Diploma of Financial Planning, Kaplan Professional
- Masters of Applied Finance, Macquarie University
- Bachelor of Commerce, University of Sydney

## Certifications

- Chartered Financial Analyst (CFA), CFA Institute

## Areas of Advice

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

## Background

Troy Derwin is a Senior Private Wealth Adviser and Branch Manager of Ord Minnett Sunshine Coast. He has worked in financial markets for more than 30 years and has been helping private clients for more than a decade.

Troy's clients are wealthy families and their associated entities, who value Troy's ability to be able to distil what can be complex strategies into sophisticated yet understandable advice.

Troy takes the time to get to know his clients personally, such that he develops a deep understanding of their goals and also their concerns. With this knowledge, he is able to deliver relevant, innovative and professional advice, while supporting and servicing his clients.

Troy has a thorough understanding of most asset classes having worked extensively across Australian and international equities, listed property, futures and fixed interest.

Troy's primary focus is to provide expert investment and strategic advice to high net worth individuals and families, their companies, trusts and superannuation funds.



Financial  
Planning



Portfolio Reporting  
& Administration



Retirement  
Planning



Investment Advice  
& Strategy



Superannuation  
& SMSF



Philanthropic  
Giving



Portfolio Construction  
& Management



Stockbroking



Investment &  
Market Research