

ORD MINNETT

Anthony Ward

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 Business (Accounting)

Areas of Advice

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

Background

Anthony has worked in the financial services industry since 1989. During this time, he gained valuable investment knowledge working for blue-chip financial organisations in both Sydney and London. This experience laid a strong foundation for his current senior role at Ord Minnett, Sunshine Coast.

Anthony joined the Ords team in 2003 after moving the family from the big smoke of Sydney. He has since established a successful business servicing the investment needs of high net worth individuals on the Sunshine Coast.

Anthony offers clients a comprehensive approach to wealth management, tailoring his financial advice to their individual needs, preferences, and circumstances.

His areas of specialisation include asset allocation, investment strategies, superannuation and self-managed super funds (SMSFs), wealth protection, and retirement planning.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research