

ORD MINNETT

Troy Davey

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 Davey

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Qualifications

- Graduate Diploma of Financial Planning
- Master of Business (Professional Accounting)
- Bachelor of Business (Banking & Finance)

Certifications

- Accredited Derivatives Adviser Level 1

Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies
- Redundancy / early retirement
- Retirement planning
- Superannuation & SMSF

Background

Troy Davey is a Senior Private Wealth Adviser with Ord Minnett Sunshine Coast.

Troy commenced his professional career with the Ord Minnett Brisbane team in 2006 and moved to the Sunshine Coast office in 2009. During his time with Ord Minnett, he has worked through various roles whilst studying at university.

With this extensive experience, he is now well placed to provide structuring, direct investment advice, as well as funds management services to private individuals and families, and their companies, trusts, and superannuation funds.

Troy can provide advice and portfolio management services in a range of areas including Australian shares, fixed interest, international shares, managed funds, cash management services, leveraged investments, initial public offerings (IPOs) and other capital raisings.

Specific areas of expertise include superannuation, self-managed super funds (SMSFs), pre and post-retirement planning, aged care, wealth creation, transfer strategies and portfolio management.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research