

**ORD MINNETT**

**Warren Williams**

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.



# Warren Williams

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## Qualifications

- Master of Applied Finance, Macquarie University
- Bachelor of Economics, La Trobe University

## Certifications

- Margin Lending
- Accredited Derivatives Adviser Level 1 & 2

## Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies

## Background

Warren brings a robust understanding of financial markets, offering expertise in developing tailored investment strategies.

His approach is grounded in sound asset allocation, ensuring clients' financial goals are met with precision and clarity. He provides comprehensive financial advice, guiding clients through the complexities of the market. Warren is committed to creating and implementing investment strategies that align with individual needs, fostering long-term financial security.

Warren's dedication to staying informed about market trends and applying established financial principles ensures clients receive well-informed and effective guidance.



Financial  
Planning



Portfolio Reporting  
& Administration



Retirement  
Planning



Investment Advice  
& Strategy



Superannuation  
& SMSF



Philanthropic  
Giving



Portfolio Construction  
& Management



Stockbroking



Investment &  
Market Research