

ORD MINNETT

Kieran McInerney

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.



Kieran McInerney

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Qualifications

- Graduate Diploma of Financial Planning, Kaplan Professional
- Graduate Diploma of Applied Finance and Investment, Kaplan Professional
- Bachelor of Business Financial Planning, RMIT University

Certifications

- Certified Financial Planner (CFP), Financial Planning Association of Australia

Areas of Advice

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

Background

Kieran is a Private Wealth Adviser with more than 21 years of experience, having spent the last six years with Ord Minnett and E.L. & C. Baillieu, preceded by 15 years at Goldman Sachs JBWere.

He is dedicated to providing highly specialised and comprehensive financial advice relevant to the needs of individuals and families. Kieran focuses on delivering expert guidance in taxation strategies, financial planning, and tailored investment advice to high net worth individuals, senior executives, and not-for-profit organisations.

Throughout his career, Kieran has established a strong and proven track record of building and maintaining long-term, trust-based relationships with those he advises, demonstrating a commitment to their financial well-being and success.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research