

ORD MINNETT

George Smith

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.



George Smith

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Qualifications

- Graduate Diploma of Financial Planning, Kaplan Professional
- Bachelor of Arts (Honours), University of Western Australia

Certifications

- Margin Lending
- Superannuation

Areas of Advice

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

Background

After graduating from the University of Western Australia with an Honours degree in History and English, George founded a manufacturing business in Perth in 1994. In 2001, he relocated the business to Vietnam, where he successfully operated it for 20 years before selling it in 2023. This experience taught him a great deal about business.

George has always maintained a strong interest in finance, which led him to become a financial adviser in 2010. He is particularly focused on creating and managing risk-appropriate portfolios of equities and fixed interest instruments within superannuation. His work is supported by a broad range of accreditations as well as extensive direct business ownership experience.



Financial Planning



Portfolio Reporting & Administration



Retirement Planning



Investment Advice & Strategy



Superannuation & SMSF



Philanthropic Giving



Portfolio Construction & Management



Stockbroking



Investment & Market Research