

ORD MINNETT

Soheil Naderi

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

- Graduate Diploma of Financial Planning, Kaplan Professional
- Bachelor of Applied Finance, (Portfolio Management), Macquarie University

Certifications

- Chartered Financial Analyst (CFA), CFA Institute

Areas of Advice

- Asset allocation
- Financial planning
- Investment strategies
- Life risk insurance
- Retirement planning
- Superannuation & SMSF

Background

Soheil is a dedicated Private Wealth Adviser who works closely with high net worth individuals, professionals, families, and business owners, guiding them in the growth, protection, and effective management of their wealth throughout all stages of life.

With extensive experience in investment strategy, and comprehensive financial planning, Soheil provides clear and strategic advice tailored to each client's goals. He adopts a holistic yet practical approach to wealth management, helping clients navigate complexity with confidence by simplifying their financial structure and aligning it to what matters most.

Soheil's long-term relationships are built on trust, transparency, and consistent results. His clients value his depth of knowledge, sound judgment, and the confidence they gain from working with someone who is both proactive and dependable.

His areas of expertise include portfolio management, financial planning, superannuation and SMSF, retirement planning, leverage strategies, and broader structuring solutions.



Financial Planning



Portfolio Reporting & Administration



Retirement Planning



Investment Advice & Strategy



Superannuation & SMSF



Philanthropic Giving



Portfolio Construction & Management



Stockbroking



Investment & Market Research