

ORD MINNETT

David Wallis

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.



David Wallis

Private Wealth Adviser

D: 07 5557 3305
T: 07 5557 3333
E: dwallis@ords.com.au

Ord Minnett
Level 7, 50 Appel Street
Surfers Paradise QLD 4217
ords.com.au

Qualifications

- Graduate Diploma of Finance and Investment
- Diploma of Financial Planning
- Bachelor of International Finance

Certifications

- Self-Managed Super Funds (SMSF) Specialist
- Accredited Derivatives Adviser Level 1 & 2

Areas of Advice

- Asset Allocation
- Financial Advice
- Investment Strategies
- Retirement Planning
- Superannuation & SMSF

Background

David has been providing investment and financial strategy advice for 25 years. He has previously worked with Macquarie Group, ABN Amro Morgans and MLC.

Specialising in investment portfolio management and retirement planning, David develops tailored growth and income strategies aligned to a client's objectives and risk tolerance. His clients include corporate entities, SMSFs, professional and sophisticated investors, and retail investors.

Outside of work, David is actively involved in the community. He supports several clubs, including Coach of Broadbeach Junior AFLW and as President of the Mermaid Beach SLSC Supporters Club.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research