ORD MINNETT

Robyn Leach

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

- Master of Financial Planning
- Graduate Diploma in Financial Planning
- Bachelor of Accounting
- Bachelor of Business
- Professional Diploma in Stockbroking

Areas of Advice

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

Background

Robyn has worked in the stockbroking and financial planning industry for more than 20 years and has a passion for assisting clients protect their lifestyle with adequate risk insurance, assisting them build wealth and plan for retirement.

Robyn builds long-term professional relationships with clients based on trust obtained through regular review meetings. She explains to clients how their portfolios are performing, offers rebalancing recommendations based on asset performance and ensures long-term financial goals are achieved. During market downturns Robyn offers reassurance on the importance of staying the course with investment decisions.

Robyn's primary employer in this industry has been Ord Minnett, however her career has also included a brief move to Commonwealth Financial Planning. Robyn has also worked with Central Queensland University as a casual lecturer and tutor for Business Finance and Principles of Economics, in addition to being a director of a family business and has served in the Australian Army.

Robyn has extensive experience advising clients through various life stages. Younger clients seeking to protect their assets and lifestyle with the use of adequate risk insurance. Mature clients seeking to build investment wealth and preparing for retirement. For some clients it may involve providing assistance with Centrelink.

Robyn listens to and identifies client needs and assists clients achieve their financial goals. Robyn educates clients on investment markets, their personal financial assets and product choices to provide greater understanding of how their goals will be achieved.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research