ORD MINNETT

# Mark Heffernan

Senior 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.

# Mark Heffernan


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## Qualifications

- Diploma of Financial Planning, Kaplan Professional
- Master of Applied Finance, Macquarie University
- Bachelor of Commerce, Deakin University

## Certifications

- Accredited Derivatives Adviser Level 1 & 2

## Areas of Advice

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

## Background

Mark is a Senior Private Wealth Adviser with over 20 years of experience in financial services. He began his career at Colonial First State before moving into Adviser roles at CommSec Advisory and Commonwealth Private, where he was recognised as a National Private Wealth Manager of the Year. After a number of years with the CBA Group, Mark joined Perpetual Private, progressing to Partner before moving to Ord Minnett.

Mark builds long-standing relationships by understanding each client's unique needs and tailoring investment strategies accordingly. He's known for explaining complex financial matters in a clear and relatable way. His clients include high net worth individuals and families, C-suite executives, entrepreneurs, business owners and for-purpose organisations.

He applies a disciplined approach to portfolio construction, with asset allocation as a key driver of long-term returns. Mark undertakes comprehensive research and analysis across a broad range of asset classes—including Australian and International equities, fixed income, private equity, venture capital, infrastructure, and systematic strategies—to ensure all investments meet high standards and are subject to regular review.

Clear, consistent communication is central to Mark's approach, keeping clients well-informed about market developments and their portfolios.

- Financial Planning
- Investment Advice & Strategy
- Portfolio Construction & Management
- Portfolio Reporting & Administration
- Superannuation & SMSF
- Stockbroking
- Retirement Planning
- Philanthropic Giving
- Investment & Market Research