

ORD MINNETT

Nicholas Morrison

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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M: 0424 823 100
D: 07 3214 5511
T: 07 3214 5555
E: nmorrison@ords.com.au

Ord Minnett
Riparian Plaza,
Level 34, 71 Eagle Street
Brisbane QLD 4000
ords.com.au

Connect with me on [LinkedIn](#)

Qualifications

- Master of Applied Finance, Kaplan Professional
- Graduate Diploma of Applied Finance, Kaplan Professional

Areas of Advice

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

Background

After starting in the financial services industry in 2008 and becoming a licensed financial adviser in 2010, Nicholas has built a strong track record of crafting and implementing diverse financial strategies tailored to individual needs. As a valued Private Wealth Adviser at Ord Minnett, he has cultivated a deep understanding of investment markets and strategy, providing crucial guidance to clients navigating intricate financial landscapes.

Nicholas brings a specialist focus to equities and broader investment strategy, alongside his proficiency in strategic asset allocation and diligent investment management. He is particularly adept at developing effective superannuation strategies and solutions for self-managed super funds (SMSFs), recognising their importance in long-term wealth creation. Nicholas's strength lies in his capacity to deliver personalised financial advice that directly addresses each client's unique financial circumstances.

This tailored approach has established him as a trusted adviser, committed to empowering clients to achieve substantial growth and effective management of their wealth through comprehensive investment services.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research