ORD MINNETT

# Hong Wei

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
- Diploma of Financial Planning, Kaplan Professional
- Bachelor of Commerce, University of Canterbury, NZ

## Certifications

- Accredited Derivatives Adviser Level 1 & 2

## Areas of Advice

- Financial advice
- Investment strategies
- Life risk insurance
- Redundancy / early retirement
- Retirement planning
- Superannuation & SMSF

## Background

Hong Wei joined Ord Minnett in 2014 and became a licensed Private Wealth Adviser in 2018. Since then, he has been dedicated to building and preserving client wealth, focusing on bespoke investment solutions tailored to each client's unique financial goals and risk profile.

His approach centres on creating prudent, well-structured plans that align strategy and portfolio design for long-term capital growth. Hong specialises in advising self-managed super fund (SMSF) retirees and high-net-worth investors, integrating core holdings in direct equities and ETFs with advanced portfolio management techniques.

A key area of his expertise is the implementation of sophisticated options strategies to proactively manage risk, generate additional income, and enhance overall portfolio returns.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research