

ORD MINNETT

Matthew Lean

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.



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Connect with me on [LinkedIn](#)

Qualifications

- Bachelor of Commerce, University of Queensland
- Professional Diploma in Stockbroking, Stockbrokers Association of Australia

Certifications

- Accredited ASX/ACH Responsible Executive (RE)
- Accredited Derivates Adviser Level 1 & 2
- Margin Lending

Areas of Advice

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

Background

Matt became a fully licensed financial adviser in 2006 and has been providing financial advice ever since. He brings over twenty years of experience in the financial services industry, including more than a decade as Senior Vice President at Morgan Stanley.

Matt is dedicated to empowering his clients with confidence and clarity. He provides the insights and information they need to navigate their financial paths effectively, and he actively involves them in the decision-making process, ensuring they have full ownership of their choices.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research