ORD MINNETT

# James Bristow

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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## Qualifications

- Master of Applied Finance (Financial Planning), Kaplan Professional
- Post Graduate Diploma of Applied Finance (Financial Planning), Kaplan Professional
- Registered Tax (Financial) Adviser, Tax Practitioners Board

## Certifications

- Accredited Derivatives Adviser Level 1
- Margin Lending

## Area of Advice

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

## Background

James Bristow is an experienced Senior Private Wealth Adviser at Ord Minnett, with over 16 years of expertise in financial markets and wealth management. He specialises in working with high net worth individuals, families, and organisations to develop comprehensive financial strategies that preserve and grow wealth across generations.

James combines deep market knowledge with a personalised approach to deliver tailored investment solutions designed to meet each client's specific objectives. He believes that exceptional wealth management begins with understanding each client's unique story, values, and aspirations.

His collaborative approach ensures clients remain informed and confident in their financial decisions throughout all market environments.

James brings deep expertise in personalised investment strategies for high net worth and ultra-high net worth clients, with a strong focus on strategic retirement planning and self-managed super fund (SMSF) management. His capabilities include dynamic asset allocation, sophisticated portfolio construction, wealth preservation, and intergenerational wealth transfer planning. He is also highly skilled in risk management, capital preservation, and coordinating estate planning with family governance structures. His expertise is especially valuable to clients requiring complex portfolio strategies across multiple asset classes, seeking tax-effective wealth accumulation and preservation, navigating major life transitions, or establishing robust succession and estate planning frameworks.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research