ORD MINNETT

Chris Jenyns

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

- Graduate Diploma in Applied Finance and Investment, FINSIA
- Diploma of Financial Planning, Kaplan Professional
- Professional Diploma of Stockbroking, Stockbrokers Association of Australia
- Bachelor of Business (Banking & Finance), Queensland University of Technology

Certifications

- Superannuation Accreditation, RMIT
- Accredited Derivatives Adviser, Level 1 & 2
- Synthetic Series 7 (Licensed to trade equities globally), Morgan Stanley Wealth management

Areas of Advice

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

Background

Chris has worked in the financial services industry for more than 20 years, allowing him to develop a deep understanding of financial markets and multi asset class portfolio construction.

In 2007, Chris formed a partnership with John Cater to focus on providing tailored advice and a high level of service to help clients simplify and improve their financial affairs. The pair's clients are financially independent and include individuals who have created significant wealth, high-income earners, families, small businesses and charities. With over 40 years combined experience in the financial services industry, they have the background and expertise to provide each client with a sound wealth preservation strategy to avoid putting their strong financial position at risk.

Chris and John's guidance covers any aspect that may affect clients' financial lives, including asset allocation, portfolio construction and management, portfolio risk analysis, superannuation and retirement planning, personal and business risk insurance, tax effective investment strategies, managing liquidity events, executive stock option management, consolidated reporting and full portfolio administration, estate planning, and philanthropic strategies.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research