ORD MINNETT

Jason McLean

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.

Jason McLean

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Qualifications

- Master of Business Administration (MBA), Macquarie University
- Master of Applied Finance (Financial Planning), Kaplan Professional
- Diploma of Financial Services (Financial Planning), Kaplan Professional

Areas of Advice

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

Background

Jason brings 16 years of experience in strategic financial planning advice, technology, and management. His career began in the financial services sector in 2007, gaining diverse experience across various roles and organisations, including NAB, Shadforth Financial Group, and a number of smaller financial services firms.

As a Private Wealth Adviser at Ord Minnett, Jason empowers clients with strategic advice to build and protect their wealth. Since joining Ord Minnett in 2017, he has also applied his deep expertise to support the firm's adviser network, providing strategic superannuation and tax insights. This supports effective structuring, compliance, and long-term value creation across complex private wealth and business frameworks.

Jason's approach is rooted in a deep understanding of each client's unique needs and aspirations. He ensures this advice is not only implemented but also continually monitored to keep clients on track towards their financial goals.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research