

ORD MINNETT

James Legoe

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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M: 0404 019 338
D: 03 9608 4108
E: jlegoe@ords.com.au

Connect with me on [Linkedin](#)

Ord Minnett
Level 22
35 Collins Street
Melbourne VIC 3000
ords.com.au

Qualifications

- Bachelor of Commerce, University of Melbourne
- Bachelor of Engineering (Civil with Honours), University of Melbourne

Certifications

- Chartered Financial Analyst, CFA Institute
- Accredited Derivatives Adviser Level 1 & 2

Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies
- Superannuation & SMSF

Background

With more than 20 years of experience in finance, James began his career as an Investment Adviser at a major global investment bank before joining Ord Minnett in 2009.

As a Level 1 & 2 Accredited Options Adviser, James provides expert advice on equities, options, and other derivative products. CFA-qualified, he specialises in developing investment strategies within a comprehensive asset allocation framework.

By leveraging both top-down and bottom-up research, James crafts personalised portfolios that align with clients' unique financial objectives, risk tolerance, and long-term wealth goals.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research