

ORD MINNETT

Sonya O'Mahony

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.



Sonya O'Mahony

Private Wealth Adviser

M: 0417 580 418

D: 03 9608 4104

E: somahony@ords.com.au

Connect with me on [LinkedIn](#)

Ord Minnett

Level 22

35 Collins Street

Melbourne VIC 3000

ords.com.au

Qualifications

- Graduate Diploma of Financial Planning, Kaplan Professional
- Bachelor of Business (Accounting), Monash University

Certifications

- Chartered Accountants Australia and New Zealand (CA ANZ)

Areas of Advice

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

Background

Sonya brings over six years of experience in the financial services industry, underpinned by a strong foundation as a qualified Chartered Accountant and a Graduate Diploma of Financial Planning.

Her career began in accounting, where she developed a deep understanding of financial structures, tax and compliance. She later transitioned into wealth management, gaining hands-on experience as a Paraplanner, Associate Adviser, and Private Wealth Assistant.

Today, Sonya works collaboratively with a team of senior private wealth advisers to deliver tailored investment and wealth strategies that help clients achieve their long-term financial goals.

She specialises in strategic wealth management, with a focus on building enduring, high-trust relationships. Passionate about personalised education, Sonya empowers clients to understand the value of quality financial advice and feel confident in their decisions.



Financial
Planning



Investment Advice
& Strategy



Portfolio Construction
& Management



Portfolio Reporting
& Administration



Superannuation
& SMSF



Stockbroking



Retirement
Planning



Philanthropic
Giving



Investment &
Market Research