ORD MINNETT

Tom Hartvigsen

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.

Tom Hartvigsen

Private Wealth Adviser

M: 0434 198 974
T: 07 5231 9966
E: thartvigsen@ords.com.au

Connect with me on LinkedIn

Ord Minnett
70 Noosa Drive
Noosa Heads QLD 4567
ords.com.au

Qualifications

- Bachelor of Commerce (Financial Planning & Accounting)

Certifications

- Certified Financial Planner (CFP), Financial Planning Association of Australia

Areas of Advice

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

Background

Tom Hartvigsen is a Financial Planner and Private Wealth Adviser with Ord Minnett Noosa.

Tom started with Ord Minnett in 2022, having previously worked for AMP for 10 years providing strategic and technical advice to its adviser network. He knows the coast community well, having completed all schooling and tertiary studies, right here, on the Sunshine Coast.

Tom provides peace of mind to a select group of investors who are looking for a sophisticated level of advice through prudent wealth management.

Our wealth management service is a combination of financial planning, stockbroking, funds management and administration, giving our clients a holistic solution for their investment needs.

We take the time to listen to you, to gather a complete understanding of your goals and objectives. Our services are open architecture, and our preference is to invest directly wherever possible. As a result, we provide investment management without conflict or compromise, and with complete transparency.

Tom can provide advice and portfolio management services in a range of areas including:

- Australian and international shares;
- Fixed interest and cash management solutions; and
- Managed funds, leveraged investments, initial public offerings (IPOs) and other capital raisings.

Specific areas of expertise include superannuation and self-managed super funds (SMSFs), retirement planning, age pension strategies, wealth creation and protection strategies, and intergenerational wealth planning.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research