

ORD MINNETT

Lachlan Cameron

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, Securities Institute of Australia
- Bachelor of Business, University of Technology Sydney

Certifications

- Accredited Derivatives Adviser Level 1 & 2
- Margin Lending
- Superannuation

Areas of Advice

- Asset allocation
- Investment strategies
- Superannuation & SMSF

Background

Lachlan brings more than 20 years of experience as a Financial Adviser and investment professional, working closely with a diverse clientele ranging from high net worth individuals and self-managed super funds (SMSFs) to the not-for-profit sector.

He offers an experienced and reasoned approach to both investment advice and portfolio management, ensuring his clients feel well-informed and confident that their investments are being managed appropriately. Lachlan has extensive experience in developing customised portfolio constructions and providing ongoing portfolio management.

Lachlan's balanced and reasoned approach to investment advice specifically considers strategic asset allocation to align each client's investment strategy with their unique investment goals and risk profile, fostering a sense of security and understanding.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research