ORD MINNETT

Anindya Bhattacharjee

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.

Anindya Bhattacharjee

Private Wealth Adviser

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Qualifications

- Graduate Diploma of Financial Planning, Kaplan Professional
- Diploma of Financial Planning, Pinnacle Financial Services Academy
- Bachelor of Commerce (Finance), UNSW
- Bachelor of Science (Psychology), UNSW

Certifications

- Certified Investment Management Analyst (CIMA), Portfolio Construction Forum

Areas of Advice

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

Background

Ani is a trusted and experienced Private Wealth Adviser who partners with aspirational individuals and families to help them lead successful, fulfilling lives. He has worked with clients from a wide range of backgrounds, including corporate lawyers, executives, business owners, philanthropists, and not-for-profits bringing a proactive and best-practice approach to simplifying complex financial affairs.

Ani takes a collaborative approach to advice, engaging with subject matter experts across lending, accounting, estate planning, investment research, and other specialist areas to ensure every aspect of a client's financial strategy is carefully considered and aligned. By working alongside other trusted professionals, Ani helps his clients gain clarity and confidence, enabling them to define and achieve success on their own terms, whether personal, professional, financial, or otherwise.

Ani specialises in providing holistic financial advice, supporting clients through all stages of wealth building and retirement. He primarily works with individuals who are growing their incomes and looking to invest for both short and long-term goals, as well as those approaching or recently entering retirement. His advice is grounded in a deep understanding of each client's unique circumstances, with a focus on building strong foundations.

This includes tailored guidance on cash flow management, entity structuring, personal and business insurance, superannuation including self-managed super funds (SMSFs) and investment strategies. Ani's goal is to ensure every client feels supported, informed, and confident in their financial journey.

Outside of work, Ani enjoys the outdoors, spending time at the beach or exploring national parks with his wife. He's also an avid reader and is gradually taking up golf and tennis.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research