ORD MINNETT

# Michael Egan

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.

# Michael Egan

Senior Private Wealth Adviser


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## Qualifications

- Bachelor of Economics, The University of Sydney
- Diploma in Export Management, College of International Business
- Diploma of Financial Planning, Financial Planning Association

## Certifications

- Chartered Accountant, Institute of Chartered Accountants in Australia
- Series 7 - General Securities Representative Exam, FINRA
- Accredited Derivatives Adviser Level 1 & 2

## Areas of Advice

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

## Background

Following a successful career at large accounting firms, Michael now has more than 25 years of experience working in financial markets at Merrill Lynch, UBS, and now Ord Minnett. He structures his advice, strategies, and products to meet the specific needs of his clients.

Michael is an economics graduate from The University of Sydney, a qualified Chartered Accountant and financial planner, with financial accreditation to trade in local and international markets and derivatives.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research