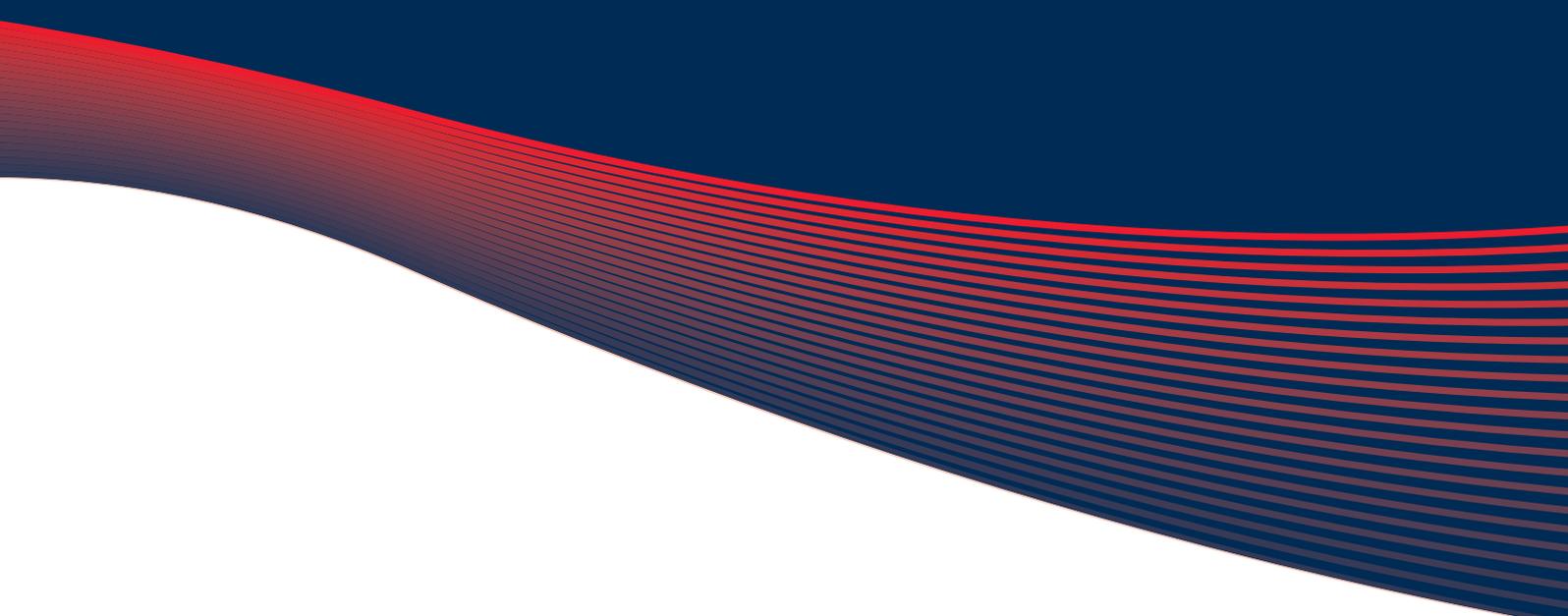# ORD MINNETT

Leo Tang

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.

Leo Tang
Senior Private Wealth Adviser

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ords.com.au

Qualifications

- Bachelor of Commerce, Monash University
- Bachelor of Economics, Monash University
- Graduate Diploma of Financial Planning, Kaplan Professional

Certifications

- Self Managed Superannuation Funds, Kaplan Professional
- DFP5v3 Tax for Financial Advising, Kaplan Professional

Areas of Advice

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

Background

Leo is a Private Wealth Adviser with more than 15 years of experience in the financial services industry. He has worked at Perpetual Private Wealth and JBWere locally, as well as Fidelity, HSBC, and JP Morgan in London.

Leo has a proven track record of guiding clients through complex financial decisions and consistently delivering strong outcomes.

He recognises that every individual has unique goals and financial circumstances, and he takes the time to understand each client.

By helping clients make clear, informed decisions, Leo ensures they remain confidently on course toward their objectives. Drawing on deep expertise in financial planning, wealth management, asset allocation, and risk management, he tailors strategies designed to optimise long-term financial wellbeing.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research