

**ORD MINNETT**



**Daniel Rosenthal**

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.



# Daniel Rosenthal

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## Qualifications

- Bachelor of Commerce (Finance, Financial Planning & Economics), Deakin University

## Certifications

- Accredited Derivatives Adviser Level 1

## Areas of Advice

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

## Background

For more than 12 years, Daniel has guided clients as a Private Wealth Adviser, delivering expert investment and financial counsel. At Ord Minnett, he translates his profound passion for financial markets into enabling clients to achieve their financial aspirations.

Daniel's specialisation lies in the strategic management and advisory of funds for sophisticated professional investors and high net worth individuals, providing bespoke solutions across a comprehensive array of products and services. His proficiency encompasses portfolio management, international and domestic stockbroking, funds management, self-managed super funds (SMSFs), fixed-income services, margin lending, and initial public offerings (IPOs).

Daniel collaborates closely with clients to formulate tailored strategies that precisely align with their financial objectives, ensuring each investment approach is both impactful and highly personalised.



Financial Planning



Investment Advice & Strategy



Portfolio Construction & Management



Portfolio Reporting & Administration



Superannuation & SMSF



Stockbroking



Retirement Planning



Philanthropic Giving



Investment & Market Research