

ORD MINNETT

Luke Headland

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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Ord Minnett

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Connect with me on 

Qualifications

- Graduate Diploma of Applied Finance
- Graduate Diploma of Financial Planning
- Professional Diploma in Securities & Derivatives
- Diploma of Financial Services (Financial Planning)

Certifications

- Accredited Derivatives Adviser Level 1

Areas of Advice

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

Background

Luke Headland is a Senior Private Wealth Adviser at Ord Minnett, having joined the firm in 2003. He provides strategic, tailored advice to high-net-worth individuals, families and business owners seeking to protect, grow and transition their wealth.

Luke specialises in the construction and management of diversified direct investment portfolios, with particular expertise in Australian and international shares and fixed income. He works with clients on investment strategy, asset allocation, superannuation and SMSFs, retirement planning, portfolio reporting and administration.

A significant part of Luke's practice is supporting business owners and families through periods of change. This includes guidance on business exits, investing sale proceeds, retirement and succession planning, estate and inheritance matters, and the long-term transfer of wealth.

Luke combines disciplined investment management with a practical understanding of each clients' personal, family and commercial objectives. He is committed to delivering clear, considered advice and long-term strategies that help clients navigate complex financial decisions with confidence.

In 2012, Luke co-founded the Ord Minnett Visa Investment Service. He is a recognised leading expert in the Australian Significant Investor Visa program and has extensive experience advising visa holders and their families with their ongoing investment requirements.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research