

**ORD MINNETT**

**James Randall**

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.



# James Randall

Senior Private Wealth Adviser

M: 0413 184 850  
D: 03 9608 4125  
T: 03 9608 4111  
E: JRandall@ords.com.au

Ord Minnett  
Level 22  
35 Collins Street  
Melbourne VIC 3000  
ords.com.au

Connect with me on [LinkedIn](#)

## Qualifications

- Bachelor of Business (Banking & Finance)
- Bachelor of Marketing

## Certifications

- Accredited Derivatives Adviser Level 1

## Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies

## Background

James has worked in the financial services industry since 1997 and brings more than 30 years of market experience gained through senior roles with UBS, Macquarie and Ord Minnett.

James believes great advice goes beyond numbers. His approach centres on understanding what truly matters to clients, helping them plan with clarity and confidence, and supporting them through the financial and personal milestones that shape their future. Whether assisting clients to grow and preserve wealth, manage risk or plan for future generations, he remains focused on delivering advice that is tailored to the needs of each individual and their family. A disciplined approach to portfolio construction underpins his investment philosophy, ensuring clients remain on track to achieve their long-term objectives.

Together with his team, James offers a comprehensive wealth management service that encompasses strategic financial planning, superannuation and estate planning. This integrated approach ensures clients benefit from holistic advice across all aspects of their financial affairs.

Outside of work, James is actively involved in his family's charitable foundation, a legacy established by his late father. The foundation supports a broad range of causes, including medical research, social welfare and mental health initiatives. He is also a keen golfer, skier and traveller, and is the proud father of three children.



Financial Planning



Portfolio Reporting & Administration



Retirement Planning



Investment Advice & Strategy



Superannuation & SMSF



Philanthropic Giving



Portfolio Construction & Management



Stockbroking



Investment & Market Research