

ORD MINNETT

Jonathan Haslam

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.



Jonathan Haslam

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Qualifications

- Master of Applied Finance (Investing), University of Wollongong
- Graduate Diploma Financial Planning, Kaplan Professional

Areas of Advice

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

Background

Jonathan has been with Ord Minnett for more than eight years, having worked in private wealth operations before transitioning to an advisory role in 2025 and becoming a fully licensed Private Wealth Adviser in 2026.

He is passionate about developing tailored, clearly defined strategies that help clients build, preserve and grow their wealth over the long term. His focus is on delivering exceptional service and fostering trusted, enduring client relationships.

Jonathan's expertise in investment markets and wealth strategy helps simplify the complexities of portfolio management, retirement planning and tax-effective wealth structures. Jonathan is currently a candidate in the CFA Program, working toward the Chartered Financial Analyst (CFA) designation.

Leveraging advanced qualifications in financial analysis, investments and financial planning, Jonathan provides clients with the insight and clarity needed to make informed decisions and feel confident in managing their wealth.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research