ORD MINNETT

Sam Smith

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.

Sam Smith

Private Wealth Adviser

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Qualifications

- Bachelor of Economics, The University of Sydney
- Graduate Diploma in Financial Planning, Kaplan Professional

Areas of Advice

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

Background

Sam is a Private Wealth Adviser who provides tailored financial planning and investment advice to individuals, families and organisations.

Sam is committed to building long-term client relationships and takes the time to develop a deep understanding of each client's personal circumstances, goals, and aspirations to deliver meaningful outcomes.

His expertise includes strategic financial planning, tailored asset allocation, investment advice, superannuation, and retirement planning. Sam enjoys the variety and complexity of working with clients across different life stages, recognising that no two situations are the same.

Whether helping clients build and protect wealth, prepare for retirement, navigate a liquidity event, or develop effective wealth transfer strategies for future generations, Sam takes a personalised approach to delivering solutions that align with their long-term objectives.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research