

ORD MINNETT

Dylan Sheldon

Investment 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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Qualifications

- Bachelor of Economics (Economics & Finance), The University of Sydney

Certifications

- CFA Investment Foundations Certificate

Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies

Background

Dylan has more than five years of experience in private markets and funds management, helping clients navigate investment opportunities with a disciplined and strategic approach.

He is committed to building long-term relationships founded on trust, transparency and a deep understanding of each client's unique circumstances and objectives. Dylan specialises in designing balanced, tailored investment solutions that align with clients' financial goals, risk tolerance and evolving needs.

Drawing on his experience across investment markets and portfolio management, Dylan works closely with individuals, families and business owners to develop strategies focused on growing and preserving wealth over the long term. He takes a proactive and client-focused approach, helping clients make informed decisions and remain confident through changing market conditions.

Passionate about delivering quality advice and personalised service, Dylan partners with clients to simplify complex financial matters and create investment portfolios that support their lifestyle and long-term aspirations.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research