ORD MINNETT

James Paterson

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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Qualifications

- Bachelor of Business (Financial Planning), RMIT University

Certifications

- Certified Financial Planner (CFP®), Financial Planning Association of Australia
- Self-Managed Superannuation Funds (SMSF) Accreditation, Kaplan Professional
- Margin Lending Accreditation Program, Stockbrokers Association of Australia
- Series 7 Investment Accreditation, Morgan Stanley

Areas of Advice

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

Background

James Paterson CFP® has worked in the financial services industry for more than 25 years and has extensive experience providing strategic financial advice.

He prides himself on working closely with his clients to understand their unique needs and objectives, drawing upon his strong technical background to build comprehensive wealth management strategies.

With an intricate knowledge of superannuation, retirement planning, wealth accumulation and personal risk protection, James helps clients to examine the full context of their financial situation. Working together with his clients, he helps build the framework for financial success now and for years to come.

James holds a Bachelor of Business Degree in Financial Planning from RMIT University and is a Certified Financial Planner® via Deakin University. He has also lectured in the Advanced Diploma of Financial Planning at Holmesglen Institute in Melbourne.
James is a member of the Financial Advice Association Australia (FAAA).

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research

Ord Minnett Limited ABN 86 002 733 048 (Ord Minnett) holds AFS Licence Number 237121. October 2026.