ORD MINNETT

Luke Waller

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

- Graduate Diploma of Financial Planning, Kaplan Professional
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Areas of Advice

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

Background

Luke Waller is a Private Wealth Adviser based in Sydney with more than 20 years of experience in sales, business development and management within a global organisation. Having transitioned into private wealth advice, Luke is committed to building long-term client relationships and helping individuals and families grow, protect and manage their wealth through tailored financial strategies.

Luke works with high net worth individuals, families and emerging business owners, providing personalised and strategic advice designed to help them achieve their financial goals while managing risk appropriately.

He specialises in holistic financial advice, with a particular focus on investment portfolio construction and strategic asset allocation. By developing diversified investment strategies aligned with each client's unique circumstances, objectives and risk profile, Luke helps clients build and preserve wealth with confidence over the long term.

He is also a member of the Stockbrokers and Investment Advisers Association (SIAA).

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. November 2026.