ORD MINNETT

Your Private Wealth *Management Team*

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.

A collective approach

With more than 50 years of combined experience in private wealth management, we specialise in delivering comprehensive financial advice to high net worth individuals, families, and business owners. Holding high level qualifications in economics, finance, risk and financial planning, we combine deep technical knowledge with a practical, client-first approach to wealth creation and preservation.

Whether advising on philanthropic giving or navigating complex intergenerational wealth transfers, our focus is always on providing tailored, forward-thinking solutions that align with each client's unique goals, values, and long-term vision.

About the team

Leveraging a team of highly experienced professionals, we deliver trusted, strategic advice tailored to the unique personal and financial needs of sophisticated and professional investors. We clearly listen to ensure we understand each client's specific goals and objectives while drawing on decades of collective industry experience to design customised investment solutions.

Our bespoke, wholesale advisory services are underpinned by leading institutional research and provide access to a comprehensive range of direct investment opportunities across all major asset classes and alternative investments.

Areas of expertise

Our team brings extensive experience across private wealth management, financial planning, and investment strategy. We specialise in delivering tailored advice to high net worth individuals and families, with a focus on long-term wealth protection and investment maximisation.

Our expertise spans strategic financial planning, tax-efficient investment structures, superannuation and retirement planning, portfolio administration and tax reporting, philanthropic advice, and estate planning. We also have strong capabilities in corporate finance, capital markets, and fixed income - including access to wholesale bonds, term deposits, and initial public offering (IPO) opportunities.

Backed by institutional-grade research and a broad range of direct investment opportunities, we provide holistic, forward-thinking solutions designed to support our clients' evolving financial goals.

The benefits of partnering with Ords

Team of qualified experts

Our team are licensed professionals who are specialists in their field

Deep research and knowledge

Our Research Analysts continually survey local and global investment opportunities

Clarity and certainty

Our team have an ethical and legal responsibility to act in our clients' best interests

Tailored solutions

We delve deep to discover our clients' needs and tailor solutions to them

Partners who listen, then act

We take time to understand our clients' needs, then advise

Access to opportunities

We offer clients access to pre-market and wholesale investment opportunities

Sean Allitt

Senior Private Wealth Adviser

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Qualifications

- Bachelor of Commerce (Econ & Fin)
- Graduate Diploma of Financial Planning

Background

With over 15 years of experience in private wealth management, Sean specialises in delivering comprehensive financial advice to high net worth individuals, families, and business owners. Holding advanced qualifications in economics, finance, risk, and financial planning, he combines deep technical knowledge with a practical, client-first approach to wealth creation and preservation.

Sean's expertise spans strategic financial planning, superannuation and retirement strategies, portfolio administration, tax-efficient investment

structures, and estate planning. He also possesses strong capabilities in corporate finance, capital markets, and fixed income, including access to wholesale bonds, term deposits, and initial public offering (IPO) opportunities.

Whether advising on philanthropic giving or navigating complex intergenerational wealth transfers, Sean's focus is always on providing tailored, forward-thinking solutions that align with each client's unique goals, values, and long-term vision.

Louie Ognenovski

Senior Private Wealth Adviser

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Qualifications

- Master of Financial Planning
- Graduate Diploma of Financial Planning
- Diploma of Financial Planning

Background

With more than 25 years of experience in the private banking and financial services industry, Louie is a highly respected Senior Private Wealth Adviser dedicated to delivering strategic, personalised financial advice.

His extensive career has been defined by a commitment to helping clients achieve long-term financial security through disciplined planning, informed investment strategies, and a deep understanding of complex financial landscapes. Throughout his career navigating economic cycles, Louie has built enduring relationships based on trust, transparency, and performance. His clients value his depth of knowledge, strategic insight, and focus on achieving their financial success.

Louie specialises in strategic financial planning, with expertise in superannuation, self-managed super funds (SMSFs), and retirement planning, tailoring solutions that evolve with client needs and market conditions. Drawing on his experience, he provides asset allocation guidance and investment advice across diverse asset classes, grounded in rigorous analysis and risk management. He is also a member of the Financial Advice Association Australia (FAAA).

Anthony Hattersley

Senior Private Wealth Adviser

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Qualifications

- Diploma of Financial Planning
- Professional Diploma of Stockbroking

Background

Anthony is a Senior Private Wealth Adviser with more than 18 years of experience delivering tailored financial advice to individuals, families, and business owners. He specialises in retirement planning, wealth creation, superannuation strategies, and risk management. With a strong focus on client outcomes, Anthony combines technical expertise with a values-based approach to help clients achieve financial confidence and long-term security.

Anthony develops personalised investment strategies that align with each client's financial goals, risk tolerance, and time horizon. With deep expertise in portfolio construction, asset allocation, and investment risk management, Anthony helps clients build diversified portfolios designed for long-term growth and income.

He provides ongoing strategic advice to navigate market cycles, optimise tax efficiency, and take advantage of evolving opportunities. Through regular reviews and a disciplined investment approach, Anthony ensures clients remain on track to achieve their goals - whether it's funding retirement, growing wealth, or preserving capital. He is also a member of the Stockbrokers and Investment Advisers Association (SIAA).

Andrew Zannettides

Private Wealth Adviser

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Qualifications

- Bachelor of Business & Commerce (Applied Finance)
- Diploma of Financial Planning

Background

Andrew specialises in providing clients with strategic investment advice through a highly personalised approach to asset allocation.

With more than 13 years of experience in the financial services industry, his strong background in economics and finance offers clients a valuable perspective. Before joining Ord Minnett ten years ago, Andrew gained experience at CommSec Adviser Services and Commonwealth Private Bank. He is dedicated to understanding and meeting the unique personal and financial needs of his clients.

Andrew prioritises listening carefully to his clients' specific goals and objectives to design tailored investment solutions, leveraging the firm's superior institutional research and direct investment options across all asset classes.

Mitch Bogdanov

Private Wealth Adviser

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Qualifications

- Bachelor of Commerce (Finance & Financial Planning)

Background

Mitchell has been a valued member of Ord Minnett for more than five years and has steadily progressed into a lead advisory role, reflecting his commitment to achieving strong outcomes for clients. He has served as a Private Wealth Adviser within a collaborative team for more than three years, building upon more than two years of experience supporting senior private wealth advisers as an assistant.

Mitchell also brings valuable client service experience from boutique financial planning firms. He excels at establishing strong rapport with a diverse clientele, including high and ultra-high net worth families, providing trusted advice tailored to their unique financial goals and objectives, which encompass wealth accumulation, wealth preservation, and the creation of consistent income streams.

Mitchell is known for his proactive approach in identifying opportunities to add significant value and delivering tailored solutions across direct investments, superannuation strategies, and the intricacies of intergenerational wealth transfer.

Adviser support staff

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Start a conversation

Your first step to securing your financial future starts with a conversation.

You can contact **Sean, Louie, Anthony, Andrew and Mitch** directly or find out more at ords.com.au

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