

ORD MINNETT

Brett Waller | Luke Headland

Senior Private Wealth Advisory 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

Partnering with Brett Waller and Luke Headland from Ord Minnett's Visa Investment Service Team ensures a highly responsive and personalised experience, uniquely designed to support investors navigating Australia's visa-linked investment pathways.

With specialised expertise in complying investment frameworks and a deep understanding of the Significant Investor Visa (SIV), Investor Visa (IV) and National Innovation Visa (NIV) programs, they offer a rare combination of regulatory insight and sophisticated investment strategy. Their knowledge of financial markets, government policy, and migration-linked investment requirements allows them to craft bespoke portfolios that align with both residency objectives and long-term wealth creation.

About the team

Beyond visa-related investments, Brett and Luke act as trusted advisers to their clients in Australia, offering comprehensive wealth management solutions tailored to evolving financial goals. Whether it is portfolio diversification, intergenerational wealth planning, or strategic asset allocation, they provide ongoing support and guidance well beyond the initial visa process.

Committed to delivering exceptional outcomes, they help clients navigate complex regulatory landscapes, mitigate risks, and capitalise on opportunities. Whether you are a high net worth individual seeking residency through investment or an immigration professional supporting such clients, Luke and Brett ensure you receive expert, forward-thinking financial advice at every step.

Areas of expertise

The team specialises in wealth management for high net wealth families, business leaders, and investors worldwide. With expertise in direct equities, property REITs, wholesale corporate bonds, private equity, and managed investment schemes, Brett and Luke help clients grow and protect their wealth.

As pioneers in investment migration, they advise on post-business exit strategies and global investor programs. Brett and Luke are leading experts in the Australian Significant Investor Visa and Investor Visa, providing strategic guidance to international clients.

Combining technical knowledge with forward-thinking solutions, they empower investors to navigate complex financial landscapes with confidence and clarity.

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



Brett Waller

Senior Private Wealth Adviser

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Connect with me on [LinkedIn](#)

Qualifications

- Master of Financial Planning, Kaplan Professional
- Graduate Diploma of Financial Planning, Kaplan Professional
- Professional Diploma in Stockbroking, Stockbrokers and Investment Advisers Association (SIAA)

Background

Following more than 25 years with a major Australian bank, Brett spent eight years as Senior Vice President of a Fortune 500 Company in Singapore and Hong Kong, providing high-level financial planning and investment advice. A pioneer in investment migration, Brett established Ord Minnett's Visa Investment Service in 2012 and is a key adviser for Investor and Significant Investor Visas. Brett offers personalised service across wealth management, asset protection, and estate planning, including self-managed super funds (SMSFs) and family trusts, via diverse asset classes. Brett is a Master Practitioner Member of the Stockbrokers and Investment Advisers Association (SIAA).

Licensed in Australia and Hong Kong, Brett provides specialist wealth creation advice for expats in the region, leveraging data and analysis to help clients achieve their long-term financial goals. Brett also specialises in providing investment solutions and advice for Hong Kong's residence-by-investment visa, the Capital Investment Entrant Scheme (CIES).

Adviser support staff

Jack Zhou, Private Wealth Assistant

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Luke Headland

Senior Private Wealth Adviser

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Qualifications

- Graduate Diploma of Applied Finance
- Graduate Diploma of Financial Planning
- Professional Diploma in Securities and Derivatives
- Diploma of Financial Services (Financial Planning)

Background

Luke has been a valued member of Ord Minnett since 2003. He is a recognised leading expert in the Australian Significant Investor Visa and a specialist in constructing diversified direct investment portfolios.

Luke is a trusted adviser, providing strategic and holistic financial advice to high net worth individuals, families, and business owners. His areas of expertise are broad, encompassing the intricacies of the Significant Investor Visa program, direct investments in Australian and international shares and bonds, specialist advice on self-managed super funds (SMSFs), comprehensive retirement planning, navigating business exits, providing guidance on deceased estates and inheritance matters, and strategic succession planning for future financial security.

Luke is dedicated to providing tailored and insightful advice to help his clients achieve their diverse financial objectives.

Start a conversation

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

You can contact **Brett** or **Luke** directly or find out more at ords.com.au

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A series of approximately 20 thin, wavy red lines that sweep across the lower half of the page, creating a sense of movement and flow.

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