ORD MINNETT

Daniel Swallow | Shiva Vemula

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 Daniel and Shiva provides clients with a highly responsive and engaging service, which also brings a greater diversity of skills to cater for your financial needs.

The team have the experience to navigate the complexities of financial markets, investment vehicles and economic trends, so they can tailor a strategy unique to you.

Together, the team can help you protect and grow your wealth.

About the team

With 27 years of combined experience in the financial industry, Daniel and Shiva have worked with some of the most prominent high net worth individuals and family offices across Australia's largest private banks.

They specialise in providing tailored services for high net worth clients and expertly managing the complexities of significant wealth. As an award-winning team, they have consistently achieved the highest client satisfaction scores over many years, showcasing their ability to deliver results and fulfil promises.

Their in-depth knowledge, combined with their authentic demeanour, ensures that those who seek their guidance receive the highest level of service and support, provided through a dual adviser strategy, where every client is managed by both Daniel and Shiva together.

Areas of expertise

Daniel and Shiva leverage their extensive experience and the strong support of Ord Minnett's investment and strategic research teams to deliver first-class service for their clients. This service encompasses proficiency in investment strategy, portfolio construction, research, tax, government policy, and intergenerational wealth transfer. This ensures they have unmatched access to resources and information, enhancing their comprehensive bespoke advice for their clientele.

Their shared goal is to protect and grow their clients' capital well ahead of inflation in a tax-efficient manner. With a genuine desire to help others achieve financial success, they consistently go the extra mile for their clients.

Our core values

Clients first

Always act in client's best interests

Integrity

Uphold the highest professional and ethical standards.

Exceptional Ideas

Provide forward-thinking, strategic investment solutions

Ownership

Be accountable to our clients and each other

Value

We will deliver value with every interaction and advice provided

Simplicity

Make complex, simple

Daniel Swallow

Senior Private Wealth Adviser

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Connect with me on LinkedIn

Qualifications

- Master of Applied Finance, Macquarie University
- Bachelor of Commerce, Melbourne University
- Certificate in ESG Investing, CFA Institute

Background

Daniel is a highly experienced Senior Private Wealth Adviser with more than 15 years of expertise in the financial industry, including nine as an adviser. He provides trusted investment advice to some of Australia's most successful businesspeople and families at CBA Private, ANZ Private, and most recently, Perpetual Private.

Daniel takes a thorough and methodical approach to investment management, understanding that each client has unique goals. He expertly combines his deep understanding of client needs with an endowment-style investment strategy, incorporating both traditional and alternative asset classes like private equity, private debt, and global infrastructure to create a bespoke diversified multi-asset portfolio tailored to their needs. His focus on protecting and growing wealth across multiple generations ensures long-term financial security and prosperity for his clients.

Shiva Vemula

Senior Private Wealth Adviser

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Qualifications

- Bachelor of Commerce (Accounting & Finance), Monash University
- Certified Financial Planner, Financial Advice Association of Australia

Background

Shiva is a highly experienced strategic Senior Private Wealth Adviser with over 12 years of expertise in advising high net worth clients. Leveraging his accounting background, he specialises in asset structuring and capital allocation strategies, providing comprehensive solutions that cover a client's entire wealth structure, including asset protection, estate planning, succession, and tax optimisation.

With previous experience at Ernst & Young, KPMG, CBA Private, and Perpetual Private, Shiva has developed a proven track record for navigating and resolving complex financial situations, with the sole focus on delivering the best possible result for his clients. This is more important than ever, in an ever-changing tax and legislative environment, where Shiva ensures his clients benefit from the strategic use of tax policy and government legislation to enhance wealth protection and capital growth attributes.

Start a conversation

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

You can contact **Daniel** or **Shiva** directly or find out more at ords.com.au

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