

ORD MINNETT

Troy Derwin | Troy Davey

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 Troy and Troy ensures a highly responsive and personalised service, supported by a wide range of skills to cater for your financial needs.

The team has the experience required to navigate complex situations and unpredictable market environments, whilst at the same time delivering advice that is bespoke, timely and easily understood.

Let Troy and Troy assist you to protect and grow your wealth.

About the team

Clients' interests and financial goals are at the centre of everything that Troy and Troy do as trusted advisory professionals.

With more than 45 years of combined experience in financial markets, they have developed a deep skill set that ensures clients receive highly professional and tailored advice.

Teamwork and experience set their service aside from competitors. Their team approach combines industry experience and practical skills to deliver relevant, innovative and professional advice, enabling them to support and service their clients.

Areas of expertise

Troy and Troy offer expert financial guidance, supported by Ord Minnett's investment and research teams. They specialise in strategic advice, asset allocation, investment strategy, tax efficiency, and intergenerational wealth transfer, ensuring clients receive tailored, well-structured advice.

The team's priority is to protect and grow capital while optimising tax outcomes. With a strong commitment to helping clients achieve lasting financial success, they go the extra mile, providing dedicated, strategic support at every stage. By combining deep industry knowledge with exclusive insights, they deliver a sophisticated and focused service designed to meet the expectations of the most discerning clients.

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



Troy Derwin

Senior Private Wealth Adviser

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Connect with me on [LinkedIn](#)

Qualifications

- Chartered Financial Analyst (CFA), CFA Institute
- Graduate Diploma of Financial Planning, Kaplan Professional
- Masters of Applied Finance, Macquarie University
- Bachelor of Commerce, The University of Sydney

Background

Troy Derwin, CFA, is a Senior Private Wealth Adviser and Branch Manager of Ord Minnett Sunshine Coast. He has worked in financial markets for more than 30 years and has been helping private clients for more than a decade.

Troy's clients are wealthy families and their associated entities, who value Troy's ability to be able to distil what can be complex strategies into sophisticated yet understandable advice.

Troy takes the time to get to know his clients personally, such that he develops a deep understanding of their goals and also their concerns. With this knowledge, he is able to deliver relevant, innovative and professional advice, while supporting and servicing his clients.



Troy Davey

Senior Private Wealth Adviser

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Connect with me on [LinkedIn](#)

Qualifications

- Master of Business (Professional Accounting), Queensland University of Technology
- Graduate Diploma of Financial Planning, Kaplan Professional
- Bachelor of Business (Banking & Finance), Queensland University of Technology

Background

Troy Davey is a Senior Private Wealth Adviser with Ord Minnett Sunshine Coast.

Troy commenced his professional career with the Ord Minnett Brisbane team in 2006 and moved to the Sunshine Coast office in 2009. During his time with Ord Minnett, he has worked through various roles whilst studying at university.

With this extensive experience, he is now well placed to provide structuring, direct investment advice, as well as funds management services to private individuals and families, and their companies, trusts, and superannuation funds.

Specific areas of expertise include superannuation, self-managed super funds (SMSFs), pre and post-retirement planning, aged care, wealth creation, transfer strategies and portfolio management.

Adviser support staff

Lisa Delaney, Client Service Manager

T: 07 5430 4444

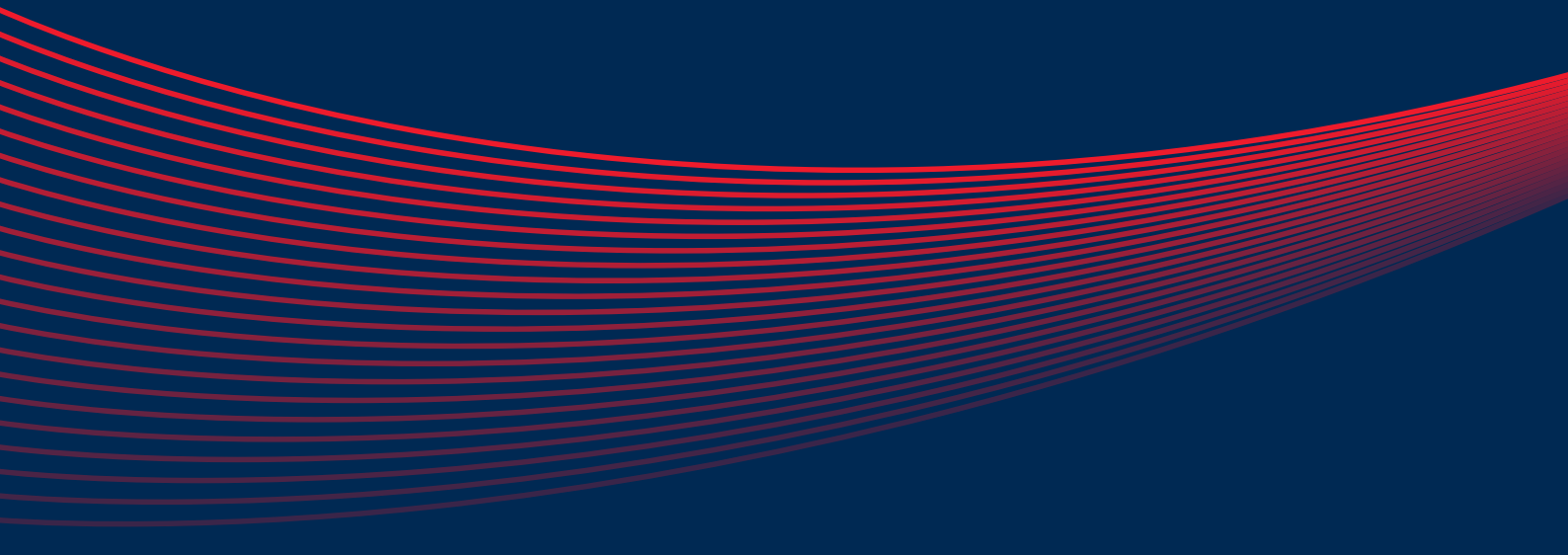
E: ldelaney@ords.com.au

Start a conversation

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

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

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A series of approximately 20 thin, parallel red lines that curve from the left side of the page towards the right, creating a sense of movement and flow.

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