ORD MINNETT

Matthew Lean | James Kaluschke

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 Matthew and James means access to a highly responsive, client-focused team with complementary strengths.

We believe teamwork unlocks a wealth of strategic possibilities, allowing us to deliver tailored solutions and exceptional service. Our combined experience in financial markets, investment strategy, and client relationship management ensures that your needs are met promptly and professionally. By working collaboratively, we provide clear, informed advice and empower you to make confident decisions.

Together, we are committed to protecting and growing your wealth, helping you navigate complexity and achieve your goals with clarity and confidence.

About the team

With more than 30 years of combined experience, Matthew and James bring deep expertise and a genuine passion for helping clients achieve financial security.

Matthew's background as a Senior Vice President at Morgan Stanley and James's wealth management experience at Morgan Stanley and Ord Minnett enables the team to deliver high-touch, personalised service.

We take pride in empowering clients through clear communication and active involvement in decision-making. Our diverse skills and collaborative approach ensure you receive the highest level of support, tailored to your unique circumstances and objectives.

Areas of expertise

Matthew and James specialise in investment strategy, tailored asset allocation, and multi-asset, multi-currency portfolio management. We work with a broad range of clients, including high net worth individuals, institutional investors, and not-for-profits. Our expertise spans financial market analysis, risk management, and client relationship management, ensuring well-informed, bespoke advice.

We are committed to delivering strategic solutions that protect and grow your wealth, supported by Ord Minnett's research and resources. Our focus is on helping you achieve your financial goals with confidence, clarity, and exceptional service at every stage.

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

Matthew Lean

Senior Private Wealth Adviser

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Connect with me on LinkedIn

Qualifications

- Bachelor of Commerce, University of Queensland
- Professional Diploma in Stockbroking, Stockbrokers Association of Australia

Background

Matt became a fully licensed financial adviser in 2006 and has been providing financial advice ever since. He brings over twenty years of experience in the financial services industry, including more than a decade as Senior Vice President at Morgan Stanley.

Matt is dedicated to empowering his clients with confidence and clarity. He provides the insights and information they need to navigate their financial paths effectively, and he actively involves them in the decision-making process, ensuring they have full ownership of their choices.

James Kaluschke

Private Wealth Adviser

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Qualifications

- Diploma of Financial Planning, Kaplan Professional
- Bachelor of Commerce (Finance), The University of Queensland

Background

James has been working in the wealth management industry for over a decade and became a registered Financial Adviser in 2018. Prior to joining Ord Minnett, he cultivated a deep understanding of financial markets and refined his client relationship management skills at Morgan Stanley.

At Ord Minnett, James collaborates with a diverse clientele, including institutional investors, high net worth individuals, and not-for-profit organisations. He specialises in providing tailored asset allocation advice, skillfully navigating multi-asset and multi-currency portfolios to ensure each client achieves their unique investment goals and objectives with both precision and strategic insight.

James is deeply committed to delivering exceptional service and fostering long-term financial success for his clients through proactive and highly personalised advice, ensuring their portfolios are strategically positioned to meet their specific needs within the broader landscape of investment services and the nuanced requirements of high net worth and institutional client advisory.

Start a conversation

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

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

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