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

Partnering with Kevin, Laurence and Hamish ensures a highly responsive and personalised service, backed by diverse expertise across accounting, actuarial, financial planning, investment, and stockbroking professions.

Their deep understanding of financial markets, investment vehicles, and economic trends allows them to craft bespoke strategies tailored to your unique goals. With a commitment to delivering exceptional outcomes through their proven collaborative approach, they provide strategic guidance designed to navigate complexities and maximise opportunities, ensuring you receive expert, forward-thinking financial advice at every step.

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

About the team

The CCB team boasts more than 135 years of combined experience in the financial industry. Kevin, Laurence and Hamish work with private investors, sophisticated clients, and family offices across Australia.

The team successfully manages the complexities of significant wealth for its clients through their proven partnership approach.

Now including the next generation of advisers with James Bristow and Mitchell Crawley as well as support staff, they combine expertise with collective wisdom, youth, and energy to deliver comprehensive financial solutions.

Their high-touch collaborative service model ensures those who seek their guidance receive the highest level of personalised service and support tailored to their unique financial goals.

Areas of expertise

Kevin, Laurence, Hamish, and the CCB team offer expert financial guidance, supported by Ord Minnett's investment and research teams.

They specialise in comprehensive wealth management, investment strategy, portfolio construction and management, superannuation and SMSF strategies, philanthropic giving, and intergenerational wealth transfer, ensuring clients receive tailored, well-informed advice across Australian and international markets.

The team's priority is to protect and grow capital while optimising outcomes through strategic financial architecture and asset allocation across diverse asset classes including equities, derivatives, fixed interest, property, and alternative investments.

With a strong commitment to helping clients achieve lasting financial success, they go the extra mile, providing dedicated collaborative support at every stage of their financial journey.

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

Kevin Cairns

Senior Private Wealth Adviser

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Qualifications

- Bachelor of Business (Accounting), Queensland University of Technology (QIT)
- Professional Diploma of Stockbroking, Stockbrokers Association of Australia

Background

Kevin embarked on his financial career with a Bachelor of Business Accounting degree from QIT, working as an accountant in a suburban practice before transitioning to the financial markets in 1986.

He joined a Brisbane stockbroking firm and gained valuable experience navigating the volatile peaks and troughs of the 1987 market crash. Kevin's market expertise was acknowledged by the ASX, leading to his nomination as a talkback radio specialist with ABC Radio, where he shared his insights for over a decade. Since joining Ord Minnett in 1998, Kevin has applied his extensive experience to managing investment portfolios and assisting a loyal group of clients with a comprehensive range of wealth management needs.

Kevin's key areas of focus include providing comprehensive financial advice, specialising in superannuation and self-managed super funds (SMSFs), and offering strategic guidance on asset allocation and financial planning.

Laurence Crawley

Senior Private Wealth Adviser

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Qualifications

- Diploma of Financial Planning, Deakin University

Background

Laurence joined Ord Minnett in 1998, bringing with him 10 years of experience in various roles within the financial services industry.

Over the years, he has built a diverse client base, typically requiring advice on private superannuation and pension funds, as well as private foundations and ancillary funds. Laurence takes a hands-on approach with his clients, guiding them through the establishment of effective financial structures to maximise their investment potential. Once these foundations are in place, he actively engages with clients, advising on and managing their portfolios to ensure alignment with their long-term financial goals.

For those he advises, Laurence's core areas of expertise include superannuation and self-managed super fund (SMSF) strategies, retirement planning, providing comprehensive investment services, and delivering tailored financial planning for foundations and ancillary funds.
He is also a member of the Stockbrokers and Investment Advisers Association (SIAA).

Hamish Bonifant

Senior Private Wealth Adviser

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Qualifications

- Graduate Diploma of Applied Finance, Securities Institute of Australia
- Professional Diploma of Stockbroking, Deakin University
- Bachelor of Economics, University of Queensland

Background

Hamish has been providing financial advice for more than three decades, with the majority of his career spent at Ord Minnett. He specialises in a broad range of asset classes, including Australian and international equities, derivatives, fixed interest, property, and alternative assets. Hamish actively manages portfolios, tailoring strategies to meet each client's unique objectives and risk tolerance. Together with his business partners, Laurence Crawley and Kevin Cairns, Hamish has built a strong, team-based approach to client service that has been foundational for more than 21 years. The team, now including the next generation of advisers, continues to deliver expertise and innovation. Hamish advises private investors, families, superannuation trustees, and not-for-profit funds. In addition to his professional work, he contributes his time to various foundations and the Council of St John's College at the University of Queensland.

Hamish's areas of expertise for his clients include providing comprehensive financial advice, specialising in superannuation and self-managed super funds (SMSFs), offering expert stockbroking services, guidance on philanthropic giving, and delivering tailored investment services across a wide range of asset classes.

James Bristow

Senior Private Wealth Adviser

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Qualifications

- Master of Applied Finance (Financial Planning), Kaplan Professional
- Post Graduate Diploma in Applied Finance (Financial Planning), Kaplan Professional

Background

James Bristow is an experienced Senior Private Wealth Adviser at Ord Minnett with over 16 years of expertise in financial markets and wealth management. He specialises in working with high net worth individuals, families, and organisations to develop comprehensive financial strategies that preserve and grow wealth across generations.

James combines deep market knowledge with a personalised approach to deliver tailored investment solutions designed to meet each client's specific objectives. He believes that exceptional wealth management begins with understanding each client's unique story, values, and aspirations.

His collaborative approach ensures clients remain informed and confident in their financial decisions throughout all market environments.

James brings deep expertise in personalised investment strategies for high net worth and ultra-high net worth clients, with a strong focus on strategic retirement planning and self-managed super fund (SMSF) management. His capabilities include dynamic asset allocation, sophisticated portfolio construction, wealth preservation, and intergenerational wealth transfer planning. He is also highly skilled in risk management, capital preservation, and coordinating estate planning with family governance structures. His expertise is especially valuable to clients requiring complex portfolio strategies across multiple asset classes, seeking tax-effective wealth accumulation and preservation, navigating major life transitions, or establishing robust succession and estate planning frameworks.

Mitchell Crawley

Private Wealth Adviser

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Qualifications

- Graduate Diploma of Financial Planning, Kaplan Professional
- Bachelor of Commerce, Finance, University of Queensland

Background

Mitch joined Ord Minnett in 2017, initially as a part-time administration assistant while pursuing his studies. Demonstrating a rapid development of passion for the financial industry, he quickly advanced through the ranks and has now served as a dedicated Adviser for several years.

Mitch is an integral part of the CCB team at Ord Minnett, where he actively collaborates with highly experienced Investment Advisers and Financial Planners on a diverse range of complex financial matters. His current role allows him to seamlessly blend his genuine enthusiasm for investment markets with a strong commitment to empowering clients in achieving their unique lifestyle and financial aspirations.

He has built a reputation for his collaborative and team-oriented approach, consistently viewing himself as a trusted partner throughout his clients' individual financial journeys, providing guidance across areas such as superannuation and self-managed super fund (SMSF) strategies, comprehensive wealth management, insightful financial advice, and tailored investment services.

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 **Kevin, Laurence, Hamish, James and Mitchell** directly or find out more at ords.com.au

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