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.


Your success backed
by our expertise

A collective approach

With more than 50 years of combined experience in private wealth management, we specialise in delivering comprehensive financial advice to high net worth individuals, families, and business owners. Holding high level qualifications in economics, finance, risk and financial planning, we combine deep technical knowledge with a practical, client-first approach to wealth creation and preservation.

Whether advising on philanthropic giving or navigating complex intergenerational wealth transfers, our focus is always on providing tailored, forward-thinking solutions that align with each client's unique goals, values, and long-term vision.

About the team

Leveraging a team of highly experienced professionals, we deliver trusted, strategic advice tailored to the unique personal and financial needs of sophisticated and professional investors. We clearly listen to ensure we understand each client's specific goals and objectives while drawing on decades of collective industry experience to design customised investment solutions.

Our bespoke, wholesale advisory services are underpinned by leading institutional research and provide access to a comprehensive range of direct investment opportunities across all major asset classes and alternative investments.

Areas of expertise

Our team brings extensive experience across private wealth management, financial planning, and investment strategy. We specialise in delivering tailored advice to high net worth individuals and families, with a focus on long-term wealth protection and investment maximisation.

Our expertise spans strategic financial planning, tax-efficient investment structures, superannuation and retirement planning, portfolio administration and tax reporting, philanthropic advice, and estate planning. We also have strong capabilities in corporate finance, capital markets, and fixed income - including access to wholesale bonds, term deposits, and initial public offering (IPO) opportunities.

Backed by institutional-grade research and a broad range of direct investment opportunities, we provide holistic, forward-thinking solutions designed to support our clients' evolving financial goals.

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

Malissa Tobias

Senior Private Wealth Adviser

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Connect with me on LinkedIn

Qualifications

- Diploma of Financial Planning, Financial Planning Association of Australia
- Bachelor of Business, Victoria University

Background

Malissa is a Senior Private Wealth Adviser at Ord Minnett, specialising in catering exclusively to high net worth clients. She provides comprehensive resources to tackle the intricate and diverse challenges associated with managing substantial wealth. Malissa has extensive expertise in offering services to entrepreneurs, executives, professionals, and individuals with significant net worth. She possesses a comprehensive understanding of tax structures and specialises in wealth accumulation, investments, superannuation including self-managed super funds (SMSFs), as well as retirement planning.

With 24 years of experience in providing holistic financial advice, Malissa began her career in financial planning at National Australia Bank, where she provided retail advice to the bank's customers. In 2003, she joined Commonwealth Private, specialising in delivering holistic and tailored advice to executive and high net worth clients with complex wealth management needs. In 2020, she joined Perpetual, where she continued to provide holistic advice to her client base, focusing on investment and strategic advice, investment strategy, portfolio construction, and philanthropy.

In her capacity at Ord Minnett, Malissa is dedicated to serving as a trusted adviser for her clients, cultivating honest and meaningful relationships while delivering an exceptional level of service to help them achieve their goals and objectives.

Con Maglis

Senior Private Wealth Adviser

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Qualifications

- Advanced Diploma of Financial Planning, Kaplan Professional
- Diploma of Financial Services (Financial Planning), Kaplan Professional
- Bachelor of Commerce (Accounting & Finance), The University of Notre Dame Australia

Background

Con Maglis is a highly regarded Senior Private Wealth Adviser and Investment Adviser with extensive experience advising not-for-profit organisations, C-suite executives, and ultra-high net worth families.

With a deep understanding of the complexities of significant wealth management, Con delivers tailored investment strategies and strategic financial guidance to help clients achieve their long-term objectives. Since 2011, Con has been a trusted adviser, offering insights that support financial security and growth. Passionate about purpose driven investing, he collaborates with philanthropists and charities to maximise their impact.

Recognised as one of Barron's Top 150 Advisers in 2024, Con specialises in bespoke wealth management solutions. He leverages his expertise for clients across investment management and portfolio construction, while also focusing on Investment Policy Statements, not-for-profits and private ancillary funds (PAFs).

Mark Heffernan

Senior Private Wealth Adviser

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Qualifications

- Diploma of Financial Planning, Kaplan Professional
- Master of Applied Finance, Macquarie University
- Bachelor of Commerce, Deakin University

Background

Mark is a Senior Private Wealth Adviser with over 20 years of experience in financial services. He began his career at Colonial First State before moving into Adviser roles at CommSec Advisory and Commonwealth Private, where he was recognised as a National Private Wealth Manager of the Year. After a number of years with the CBA Group, Mark joined Perpetual Private, progressing to Partner before moving to Ord Minnett.

Mark builds long-standing relationships by understanding each client's unique needs and tailoring investment strategies accordingly. He's known for explaining complex financial matters in a clear and relatable way. His clients include high net worth individuals and families, C-suite executives, entrepreneurs, business owners and for-purpose organisations.

He applies a disciplined approach to portfolio construction, with asset allocation as a key driver of long-term returns. Mark undertakes comprehensive research and analysis across a broad range of asset classes—including Australian and International equities, fixed income, private equity, venture capital, infrastructure, and systematic strategies—to ensure all investments meet high standards and are subject to regular review.

Clear, consistent communication is central to Mark's approach, keeping clients well-informed about market developments and their portfolios.

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 **Malissa, Con and Mark** directly or find out more at ords.com.au

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