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 Oscar, Andrew and Sonya delivers a highly strategic and personalised wealth experience, powered by more than 51 years of combined expertise. Their holistic approach is founded on deeply understanding your unique aspirations, enabling them to craft bespoke, integrated financial plans designed to secure your family's future for generations. The team's service extends beyond implementation; they continually monitor and adjust your strategy, ensuring you always have the strategic guidance needed to navigate market complexities and confidently build, protect, and grow your wealth.

About the team

Oscar, Andrew and Sonya have successfully worked across some of Australia's most prominent institutions, including Perpetual Private, Commonwealth Private, and ANZ Private. They specialise in managing the complexities of significant wealth for high net worth families. Their deep institutional experience and diverse backgrounds enable them to successfully deliver exceptional client outcomes. The team's commitment to building enduring, high-trust relationships, combined with their specialised technical rigor across financial structures and compliance, ensures clients receive the highest level of comprehensive service and support.

Areas of expertise

Oscar, Andrew and Sonya offer expert financial guidance, leveraging Ord Minnett's extensive investment and research teams. They specialise in holistic wealth management, strategic planning, portfolio construction, risk management, and intergenerational wealth transfer, ensuring tailored, integrated advice. Their priority is to build and protect client capital through carefully considered strategies. Committed to personalised education and dedicated support, they consistently go the extra mile, combining deep industry knowledge with a sophisticated, client-focused service to help clients achieve their long-term 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

Oscar Howard

Senior Private Wealth Adviser

M: 0401 499 884

D: 03 9608 4114

E: ohoward@ords.com.au

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Qualifications

- Advanced Diploma of Financial Services (Financial Planning),
  Kaplan Professional
- Bachelor of Commerce,
  The University of Melbourne

Background

Having started work in the financial services sector in 2000, Oscar has 25 years' experience across a variety of roles and organisations, including at Perpetual Private, ANZ Private, Commonwealth Private, AXA Australia, as well as a number of smaller financial services and stockbroking firms.

As a Senior Private Wealth Adviser at Ord Minnett, Oscar provides high net worth clients with strategic advice to build and protect their wealth. His approach is based on a deep understanding of each client's unique needs and aspirations. This advice is not only implemented but also continually monitored to ensure clients stay on track.

Offering a holistic wealth management approach at Ord Minnett, Oscar ensures that specialists from all relevant advice areas collaborate to create a comprehensive, fully integrated financial plan.

Andrew Epplett

Senior Private Wealth Adviser

M: 0432 835 822

D: 03 9608 4101

E: aepplett@ords.com.au

Connect with me on LinkedIn

Qualifications

- Bachelor of Commerce (Accountancy & Finance), University of Wollongong

Background

Andrew began his career in finance in 2001 and has since accumulated over 20 years of experience working with several large Australian financial institutions. Specialising in advising high net worth individuals and their families, Andrew is dedicated to understanding his clients' motivations and helping them make informed financial decisions that will benefit future generations. His approach provides clients with the guidance and peace of mind they need to live the life they desire, secure in the knowledge that their wealth is well-managed.

Andrew's areas of expertise include wealth management, financial planning, risk management, and client relationship management. His ability to build strong, lasting relationships, combined with his deep understanding of financial markets and investment strategies has allowed him to create comprehensive and tailored financial strategies for his clients.

Sonya O'Mahony

Private Wealth Adviser

M: 0417 580 418
D: 03 9608 4104
E: somahony@ords.com.au

Connect with me on LinkedIn

Qualifications

- Graduate Diploma of Financial Planning, Kaplan Professional
- Bachelor of Business (Accounting), Monash University

Background

Sonya brings over six years of experience in the financial services industry, underpinned by a strong foundation as a qualified Chartered Accountant and a Graduate Diploma of Financial Planning.

Her career began in accounting, where she developed a deep understanding of financial structures, tax and compliance. She later transitioned into wealth management, gaining hands-on experience as a Paraplanner, Associate Adviser, and Private Wealth Assistant.

Today, Sonya works collaboratively with a team of senior private wealth advisers to deliver tailored investment and wealth strategies that help clients achieve their long-term financial goals.

She specialises in strategic wealth management, with a focus on building enduring, high-trust relationships. Passionate about personalised education, Sonya empowers clients to understand the value of quality financial advice and feel confident in their decisions.

Start a conversation

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

You can contact **Oscar, Andrew and Sonya** directly or find out more at ords.com.au

Ord Minnett
Level 22
35 Collins Street
Melbourne VIC 3000

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