

ORD MINNETT

Nicholas Morrison | Francis Lake
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

Nicholas and Francis are a professional and collaborative team who provide their clients with best-in-class personalised advice with a focus on client care and service.

As specialists in both investment strategy and financial planning, Nicholas and Francis service a broad range of clients across the complete spectrum of financial advice.

No matter what stage of life you are in, from wealth accumulation to asset protection strategies, superannuation and retirement planning, Nicholas and Francis aim to provide you peace-of-mind through high quality advice.

About the team

Nicholas and Francis bring more than 20 years of combined experience in providing advice to a diverse range of clients who are at different stages of their lives, including younger professionals and growing families, mature households and retired clients. The team also provide specialist advice to clients with unique personal circumstances and goals, including high net wealth individuals, trusts and charities.

Nicholas and Francis are passionate about building long term relationships, so they can continue to provide quality advice to their clients as they move through the different stages of their lives.

Areas of expertise

Nicholas and Francis have expertise to provide advice across the investment and planning space.

Their multifaceted investment advice services, guided and supported by Ord Minnett's investment and research teams, cover all asset types and markets. Nicholas and Francis focus on high quality portfolio construction, risk management and best in class risk-adjusted returns.

Their financial planning services are equally as diverse. They provide advice across the spectrum from wealth accumulation, superannuation and self-managed super funds (SMSFs), retirement planning and debt / cash flow management.

No matter what service you are after, their first focus is to gain a deep understanding of their client's goals and objectives so they can tailor a personalised strategy to help achieve these objectives.

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



Nicholas Morrison

Private Wealth Adviser

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Qualifications

- Master of Applied Finance
- Graduate Diploma of Applied Finance

Background

After starting in the financial services industry in 2008 and becoming a licensed financial adviser in 2010, Nicholas has built a strong track record of crafting and implementing diverse financial strategies tailored to individual needs. As a valued Private Wealth Adviser at Ord Minnett, he has cultivated a deep understanding of investment markets and strategy, providing crucial guidance to clients navigating intricate financial landscapes.

Nicholas brings a specialist focus to equities and broader investment strategy, alongside his proficiency in strategic asset allocation and diligent investment management. He is particularly adept at developing effective superannuation strategies and solutions for self-managed super funds (SMSFs), recognising their importance in long-term wealth creation. Nicholas's strength lies in his capacity to deliver personalised financial advice that directly addresses each client's unique financial circumstances.

This tailored approach has established him as a trusted adviser, committed to empowering clients to achieve substantial growth and effective management of their wealth through comprehensive investment services.



Francis Lake

Private Wealth Adviser

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Qualifications

- Graduate Diploma of Financial Planning
- Admitted Lawyer, Queensland Supreme Court
- Bachelor of Laws (Honours)
- Bachelor of Business (Finance)

Background

Francis is a Private Wealth Adviser who has built a solid track record of delivering high-quality advice over his six years in the industry. He demonstrates a strong passion for enhancing his clients' financial well-being, catering to individuals at every stage of life.

Whether it's crafting wealth creation strategies for young professionals or implementing asset protection and income strategies for those in retirement, Francis is dedicated to providing his clients with greater financial freedom and peace of mind. His services are comprehensive, seamlessly integrating both investment advice and financial planning expertise to ensure a holistic and precise approach to meeting his clients' financial needs.

Clients working with Francis can rely on his expertise in delivering comprehensive financial advice, developing effective wealth creation strategies, implementing robust asset protection measures, creating tailored income strategies, offering insightful investment advice, and providing thorough financial planning.

Adviser support staff

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Private Wealth Assistant

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Start a conversation

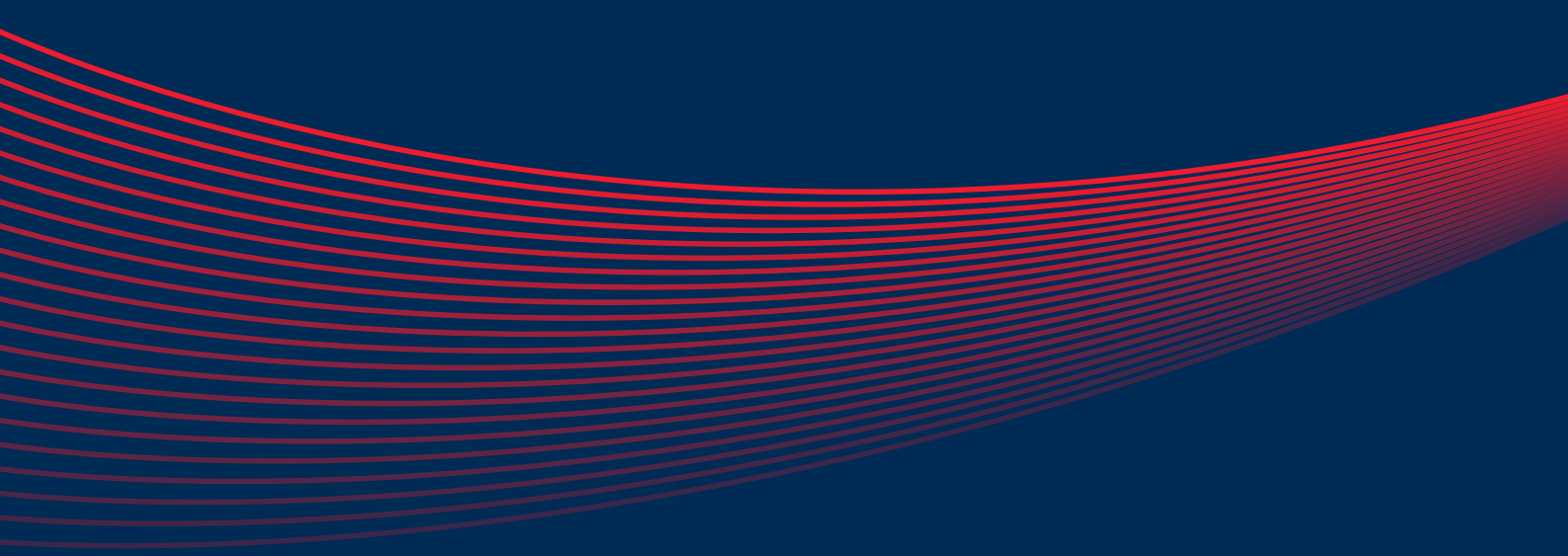
Your first step to securing your financial future starts with a conversation.

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

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Your success backed
by our expertise





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