

**ORD MINNETT**

**Benjamin Hackett | Sam Wales**  
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

Led by Ben Hackett and Sam Wales, our team delivers tailored, high-impact financial advice to individuals, families, and business owners seeking long-term wealth creation. We specialise in strategic investment planning, direct asset solutions, and intergenerational wealth management. With deep expertise and a client-first approach, we build enduring partnerships grounded in trust, transparency, and performance. Our clients include some of Australia's most successful entrepreneurs, professionals, and primary producers. We are committed to helping you secure your financial future with clarity, confidence, and control.

## About the team

Ben Hackett and Sam Wales bring over a decade of combined experience in strategic financial advice and investment management. Ben specialises in long-term wealth planning, unlisted investments, and intergenerational strategy, with a practical approach shaped by his work with both urban professionals and rural families. Sam focuses on direct investment strategies, portfolio construction, and income generation through listed markets and options. Together, we deliver tailored solutions that help clients grow, protect, and transfer wealth. Our passion lies in building enduring relationships and empowering clients to make confident financial decisions at every stage of life.

## Areas of expertise

- **Strategic Wealth Planning** – Long-term financial strategies tailored to individual goals and life stages
- **Direct Investment Advice** – Specialised in ASX-listed securities, portfolio construction, and yield-focused strategies
- **Unlisted & Private Market Access** – Origination and management of exclusive investment opportunities
- **Intergenerational Wealth Transfer** – Navigating family dynamics and succession planning across generations
- **Superannuation & Retirement Strategy** – Maximising tax-free income streams and estate planning
- **Options & Risk Management** – Income generation and portfolio protection using covered call and hedging strategies

Together we deliver independent, strategic advice to protect and grow wealth across generations. With deep expertise, personal accountability, and a client-first mindset, we provide tailored investment solutions that align with your values, optimise outcomes, and empower long-term financial confidence.

## 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



## Benjamin Hackett

Private Wealth Adviser

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Connect with me on [LinkedIn](#)

### Qualifications

- Graduate Diploma of Financial Planning, Kaplan Professional
- Diploma of Financial Planning, Monarch Institute
- Bachelor of Commerce (Finance), University of Wollongong

### Background

Benjamin joined Ord Minnett in 2018 and is dedicated to helping clients achieve their personal and financial goals, whether they are based in the city or on the farm.

Passionate about empowering his clients, Benjamin maps out clear plans to navigate dynamic markets, grow wealth and secure passive investment income. He is committed to bringing a practical and sensible approach tailored to individual circumstances.

Benjamin specialises in financial strategy and specialist investment, intergenerational wealth management, superannuation advice, as well as succession and estate planning.

Drawing on a sensible and long-term perspective, Benjamin leverages his extensive experience and the backing of Australia's largest privately owned wealth management firm. He partners with you throughout your journey, managing a bespoke investment strategy tailored to your needs.

His community involvement includes serving in the NSW Rural Fire Service, demonstrating his dedication to helping others during times of crisis.



## Sam Wales

Private Wealth Adviser

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### Qualifications

- Bachelor of Arts & Commerce (Finance & Political Science), Australian National University

### Background

Sam brings over nine years of experience in the financial services industry, underpinned by a strong foundation developed during his time at Colonial First State. There, he provided general financial advice to retail clients, building essential skills that have supported his continued professional growth.

At Ord Minnett, Sam specialises in strategic asset allocation and active portfolio management, with a keen eye for identifying and capitalising on growth and yield opportunities within the dynamic market landscape. His core focus centres on ASX-listed securities, where he develops and implements a diverse range of investment strategies that are meticulously tailored to align with the specific objectives and individual risk tolerance of each client he advises.

Recognising the importance of comprehensive financial planning, Sam also provides sophisticated risk-management and income-generating strategies through the strategic application of derivatives, ensuring a well-rounded approach to wealth management.

# Adviser support staff

## George Birch

Private Wealth Assistant

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### Start a conversation

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

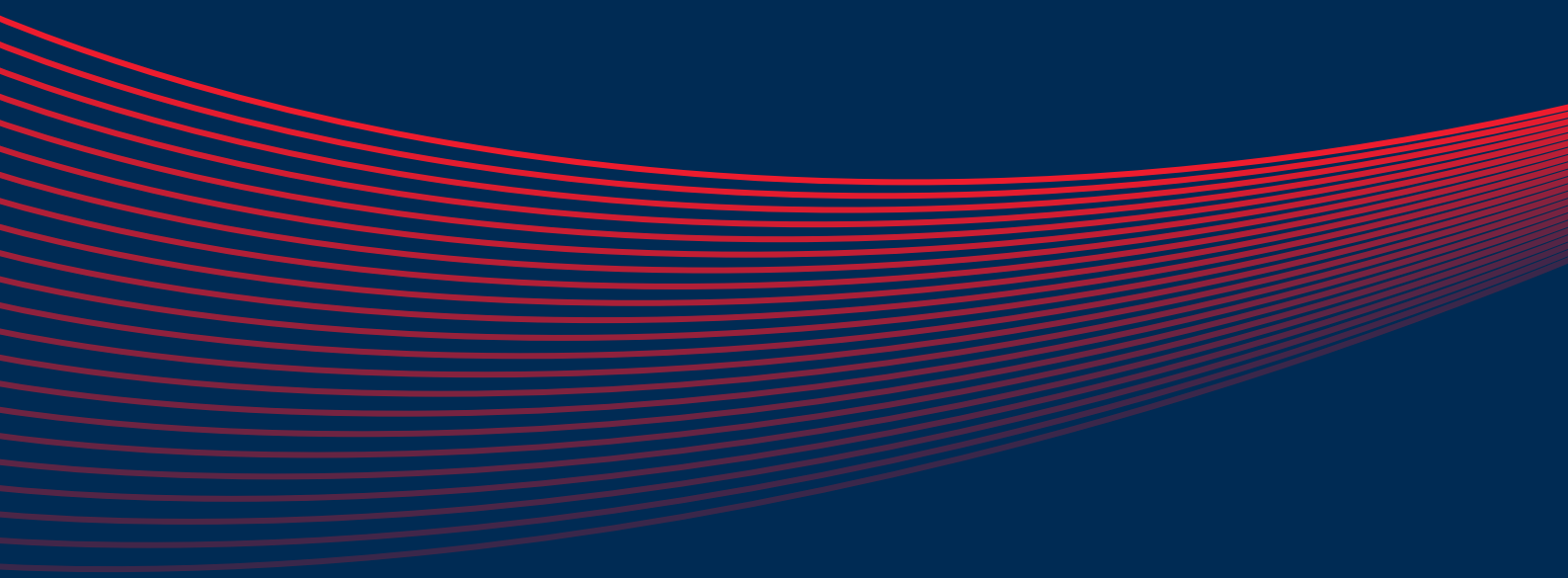
You can contact **Ben** or **Sam** directly or find out more at [ords.com.au](https://ords.com.au)

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Your success *backed  
by our expertise*





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