

ORD MINNETT

Kevin Shen | Tony Leigh

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

Partnering with Kevin and Tony gives clients access to a private wealth team that combines strategic financial planning with disciplined investment management. The team works with clients to understand the full picture before providing advice, including their family priorities, business interests, investment needs, retirement goals, estate planning objectives and wealth transfer goals. Rather than treating each area separately, the team looks at how the pieces fit together and where decisions need to be coordinated. Clients benefit from clear advice, active portfolio oversight and a long-term relationship that can adapt as markets, legislation and personal circumstances change.

About the team

Kevin and Tony bring together experience across financial planning, banking, insurance, wealth management and investment markets. The team works with high net worth individuals, families, business owners and not-for-profit organisations who value considered advice and an ongoing relationship. Their approach is built on careful listening, practical problem solving and a clear understanding that significant wealth often involves more than investment selection alone. Where appropriate, the team works alongside accountants, solicitors, mortgage brokers and other trusted advisers to help ensure advice is properly coordinated and aligned with each client's broader circumstances.

Areas of expertise

The team provides advice across wealth creation, portfolio management, superannuation, retirement planning, asset allocation, direct investments, cashflow planning, estate planning considerations and intergenerational wealth transfer. Their work is supported by Ord Minnett's broader research and investment capability, while remaining grounded in each client's specific needs and objectives. A key focus is helping clients bring structure to more complex financial situations, whether that involves managing surplus capital, generating income from portfolios, preparing for retirement, supporting family members or planning for the next generation. The aim is to provide clear, well-considered advice that helps clients protect and grow wealth over time.

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 Shen

Private Wealth Adviser

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Connect with me on [LinkedIn](#)

Qualifications

- Graduate Diploma of Financial Planning, Kaplan Professional
- Advanced Diploma in Financial Planning, AAMC Training Group
- Diploma of Financial Services (Financial Planning), AAMC Training Group

Background

Kevin brings over a decade's worth of experience in the financial planning industry and is dedicated to helping clients achieve long-term financial success. He provides holistic advice tailored to each client's goals, with a focus on building and preserving wealth, and intergenerational wealth transfer.

He takes a collaborative approach, working closely with clients' accountants, solicitors, mortgage brokers, and other trusted professionals to ensure a seamless and integrated strategy. Kevin is passionate about supporting high net worth individuals, families, and business owners in achieving and maintaining financial freedom.

His commitment to personalised service and strategic advice ensures clients receive guidance that evolves with their needs, delivering confidence and clarity at every stage of their financial journey.



Tony Leigh

Private Wealth Adviser

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Qualifications

- Bachelor of Commerce (Accounting & Finance), Lincoln University

Background

Tony brings more than a decade of experience in the financial services industry, starting his career in banking and insurance in New Zealand before transitioning into Wealth Management in 2015.

He earned his New Zealand Financial Adviser authorisation in 2018 and became NZX (New Zealand Stock Exchange) accredited in 2021. After relocating to Australia in 2024, Tony qualified as a Private Wealth Adviser at Ord Minnett in 2025.

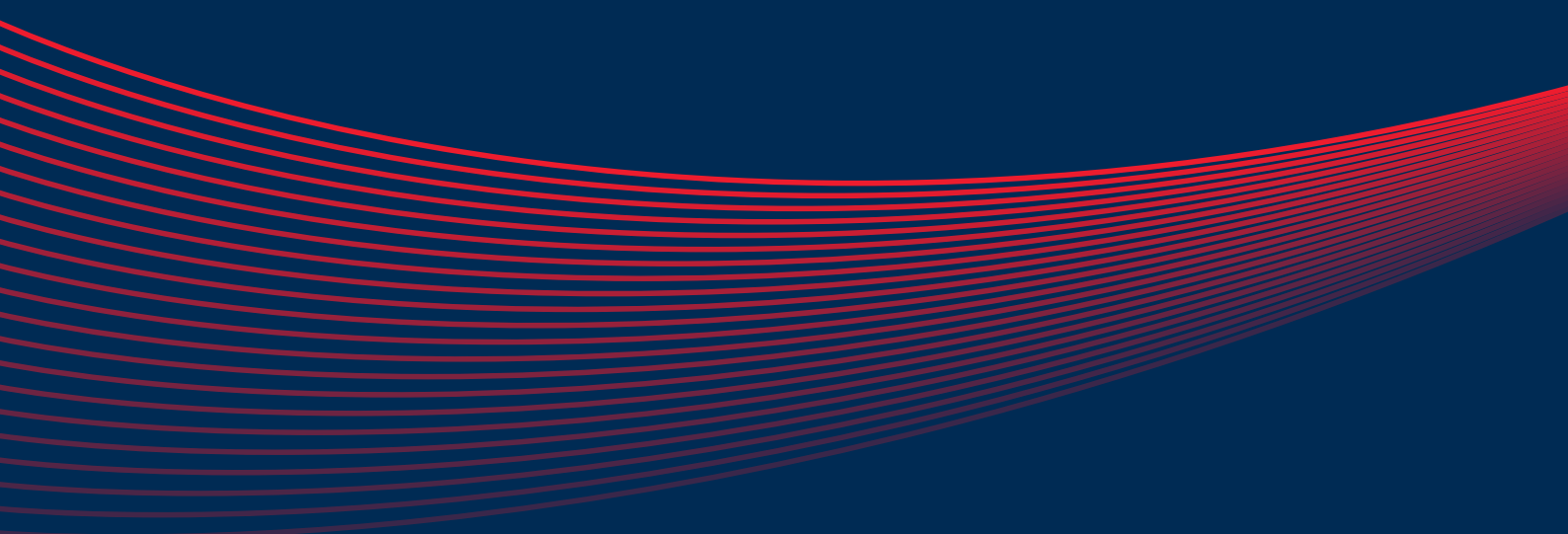
Tony specialises in investment strategy, portfolio management, asset allocation, stock analysis and client relationship management. Known for his client-first approach and sharp insight into market trends, he is passionate about helping clients achieve their financial goals through tailored, strategic investment solutions.

Start a conversation

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

You can contact **Kevin** or **Tony** directly or find out more at ords.com.au

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A series of approximately 20 thin, wavy red lines that curve from the left side of the page towards the right, creating a sense of movement and flow.

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