

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

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



Sean Allitt

Senior Private Wealth Adviser

M: 0417 898 581

D: 02 8216 6464

E: sallitt@ords.com.au

Connect with me on [LinkedIn](#)

Qualifications

- Bachelor of Commerce (Economics & Finance)
- Graduate Diploma of Financial Planning

Background

With over 15 years of experience in private wealth management, Sean specialises in delivering comprehensive financial advice to high net worth individuals, families, and business owners. Holding advanced qualifications in economics, finance, risk, and financial planning, he combines deep technical knowledge with a practical, client-first approach to wealth creation and preservation.

Sean's expertise spans strategic financial planning, superannuation and retirement strategies, portfolio administration, tax-efficient investment

structures, and estate planning. He also possesses strong capabilities in corporate finance, capital markets, and fixed income, including access to wholesale bonds, term deposits, and initial public offering (IPO) opportunities.

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



Louie Ognenovski

Senior Private Wealth Adviser

M: 0418 124 121

D: 02 8216 6372

E: lognen@ords.com.au

Connect with me on [LinkedIn](#)

Qualifications

- Master of Financial Planning
- Graduate Diploma of Financial Planning
- Diploma of Financial Planning

Background

With more than 25 years of experience in the private banking and financial services industry, Louie is a highly respected Senior Private Wealth Adviser dedicated to delivering strategic, personalised financial advice.

His extensive career has been defined by a commitment to helping clients achieve long-term financial security through disciplined planning, informed investment strategies, and a deep understanding of complex financial landscapes. Throughout his career navigating economic cycles, Louie has built enduring relationships based on trust, transparency, and performance. His clients value his depth of knowledge, strategic insight, and focus on achieving their financial success.

Louie specialises in strategic financial planning, with expertise in superannuation, self-managed super funds (SMSFs), and retirement planning, tailoring solutions that evolve with client needs and market conditions. Drawing on his experience, he provides asset allocation guidance and investment advice across diverse asset classes, grounded in rigorous analysis and risk management. He is also a member of the Financial Advice Association Australia (FAAA).

Adviser support staff

Dylan Pittar

Private Wealth Assistant

D: 02 8216 6559

E: DPittar@ords.com.au

Start a conversation

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

You can contact **Sean** or **Allitt** directly or find out more at ords.com.au

Ord Minnett

Grosvenor Place

Level 18, 225 George Street

Sydney NSW 2000