ORD MINNETT

Sam Smith | Kieran Hailes

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

Sam Smith and Kieran Hailes provide comprehensive investment advice and financial planning strategies to a diverse range of individuals, families and organisations.

Their combined experience and deep understanding of financial markets, investment vehicles and economic trends enable them to develop tailored strategies designed to help clients achieve their unique goals.

About the team

Sam and Kieran are committed to building long-term relationships with their clients, guiding them through the complexities of wealth management at every stage of life.

Taking a collaborative approach, they draw on the expertise of Ord Minnett's research and investment teams to construct diversified portfolios and deliver comprehensive advice aligned to each client's specific circumstances, objectives and needs.

Areas of expertise

Their expertise spans portfolio construction, asset allocation, strategic financial planning, investing, superannuation (including self-managed super funds (SMSFs), retirement planning and estate planning. They have extensive experience across equities, managed funds, wholesale bonds and fixed income investments, enabling them to build portfolios with an appropriate level of risk to suit each client's goals and circumstances.

With access to institutional-grade research, market insights and a broad range of direct investment opportunities, Sam and Kieran provide holistic wealth management solutions that evolve alongside their clients' changing needs.

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



Sam Smith

Private Wealth Adviser

M: 0488 621 137
D: 02 8216 6416
E: ssmith@ords.com.au

Connect with me on LinkedIn

Qualifications

- Bachelor of Economics, The University of Sydney
- Graduate Diploma in Financial Planning, Kaplan Professional

Background

Sam is a Private Wealth Adviser who provides tailored financial planning and investment advice to individuals, families and organisations.

Sam is committed to building long-term client relationships and takes the time to develop a deep understanding of each client's personal circumstances, goals, and aspirations to deliver meaningful outcomes.

His expertise includes strategic financial planning, tailored asset allocation, investment advice, superannuation, and retirement planning. Sam enjoys the variety and complexity of working with clients across different life stages, recognising that no two situations are the same.

Whether helping clients build and protect wealth, prepare for retirement, navigate a liquidity event, or develop effective wealth transfer strategies for future generations, Sam takes a personalised approach to delivering solutions that align with their long-term objectives.



Kieran Hailes

Private Wealth Adviser

M: 0437 748 359
D: 02 8216 6367
E: khailes@ords.com.au

Connect with me on LinkedIn

Qualifications

- Bachelor of Commerce (Finance), The University of Notre Dame Australia
- Graduate Diploma of Applied Finance, Kaplan Professional

Background

Kieran has 17 years of experience in the financial services industry, with a strong background in investment management. For the past 12 years, he has worked at Ord Minnett as a Private Wealth Adviser, providing investment advice and financial planning strategies to a diverse range of clients, including superannuation funds, family trusts, companies, and individual investors.

Kieran takes a personalised approach to advice, tailoring strategies to each client's objectives, financial circumstances and risk tolerance.

He specialises in the construction and ongoing management of tailored investment portfolios designed to help clients achieve their long-term financial goals. Every portfolio is developed following a thorough assessment of a client's financial position, objectives, and investment preferences.

A comprehensive risk profile is established to guide the portfolio construction process, with investments diversified across major asset classes and, where appropriate, direct ownership of the underlying investments.

Start a conversation

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

You can contact **Sam** or **Kieran** directly or find out more at ords.com.au

Ord Minnett
Grosvenor Place
Level 18, 225 George Street
Sydney NSW 2000

ORD MINNETT

Building wealth for generations

Ord Minnett Limited ABN 86 002 733 048 (Ord Minnett) holds AFS Licence Number 237121.

Private Wealth Advisory Team. November 2026.