Claudio Orrico AFP® ADV DIP, FS (FP)

PARTNER | FINANCIAL ADVISOR

Claudio has more than 20 years of experience in financial planning. He joined BG Private Clients as a Partner in 2021 when his firm merged with ours.

Knowing that wealth management is all about riding the highs and lows, Claudio gives clients peace of mind having managed client portfolios through multiple investment cycles – including volatile periods like the Global Financial Crisis and the pandemic.

Over the course of his career, he has helped grow the investment portfolios of families, executives, and SMEs.

His reassuring and down-to-earth manner, ability to provide holistic advice, attention to detail and long-term view make him a sought-after financial advisor. Many clients have remained with him for decades and recommend him to friends and family.

Claudio's tried and tested methodology starts with a comprehensive initial discovery meeting to understand the client's current position and objectives. This is followed by the creation of a calculated strategy, which covers everything from structure to investments. Then, Claudio helps clients stick to their financial plan – a crucial step to achieving the best possible outcomes in the long term.

For Claudio, the most rewarding part of the job is taking clients from A to B and being the person they call when life throws a curveball. He is at his best when helping clients problem solve and navigate uncertainty.

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Qualifications

- Advanced Diploma in Financial Planning
- Module in Securities
- Module in Self-Managed Super Funds

Memberships

- Member of Financial Advice Association of Australia (FAAA)
- Member of the SMSF Association

Highly regarded in

- Wholesale investments
- Direct equities
- Self-managed super funds

Specialisations

- Family groups
- Executives and professionals
- Pre-retirees
- High-net-worth individuals
- SMEs

Private

For Today, Tomorrow & Beyond.

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Claudio was instrumental in establishing Platinum – our wholesale offering for sophisticated investors.

Born in Argentina and with Italian heritage, Claudio is fluent in both Spanish and Italian. He is a member of the Tifosi – the Ferrari fan club, and he is working his way through the entire F1 Schedule, having been to Grands Prix in China, Malaysia, Singapore, Adelaide and, of course, Melbourne so far. He plays golf (badly) and regularly cycles along Beach Road.

View my Financial Services Guide here:
www.bgprivate.com.au/financial-services-guide

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