Accountants & Advisors

Take the lead

Daniel Minihan

Director, SW Wealth

Experience

Daniel has been with SW for over 20 years and is the Director of the Wealth Management practice and Head of Private Clients. Daniel was appointed as Partner on 1 July 2008.

Commencing as a Graduate in 1998 within the Business Consulting division, Daniel gained invaluable knowledge of Taxation Issues and Group Structures. He then moved into Wealth Management in the early 2000's becoming an Authorised Representative in 2004 and the head of the practice in 2005.

Having undertaken considerable post graduate study, with qualifications in both accounting and financial planning, Daniel also holds a Masters in Financial Planning. In his role he is responsible for the provision of financial planning and investment advisory services to the clients of the practice and is a specialist in advising busy professional clients, with a focus on tax effective structuring.

During his time in the practice Daniel has overseen many significant events including the introduction of the Australian Financial Services License, assisting clients transition to and maximise benefits under the simplified superannuation regime and helped both the practice and its clients navigate the Global Financial Crisis.

Qualifications

- Master of Financial Planning
- Graduate Diploma of Financial Planning
- Chartered Accountant
- Bachelor of Business

Professional associations

- Associate of the Institute of Chartered Accountants in Australia and New Zealand
- Fellow of FINSIA

Professional licences

- Authorised Representative No. 276433
- Daniel is authorised to provide advice on the full services and authorisations explained on page 5 of the Guide

This Advisor Profile forms the second part (Part 2) of SW Wealth's Financial Services Guide (Guide) (30 November 2023). This contains important information about your financial advisor and it should read in conjunction with SW Wealth's Guide (Part 1).