Take the lead

Daniel Minihan, Director

Wealth Management and Family Office

Daniel Minihan is a Partner of SW and Director of the Wealth Management division, with more than 25 years of experience advising high-net-worth individuals, ultra-high-net-worth families, family groups, business owners and charitable foundations. Having commenced with the firm in 1998 and led the Wealth Management practice since 2005, Daniel brings a deep understanding of investment management, taxation, structuring, superannuation, estate planning and family governance. His multidisciplinary background in accounting, advisory and financial services enables him to provide integrated, family-wide solutions tailored to complex personal, business and intergenerational wealth objectives.

Daniel specialises in working with high-net-worth individuals and families to coordinate their personal, financial and business affairs, delivering strategic advice across investment management, asset allocation, family succession planning, philanthropic structures and governance frameworks. He has extensive experience advising on the establishment and oversight of investment portfolios, family offices, private investment structures and charitable entities. His approach combines disciplined investment principles with practical implementation, helping clients preserve and grow wealth across generations while navigating increasingly complex regulatory, tax and governance environments.

Beyond his client advisory responsibilities, Daniel is actively involved in a range of executive and non-executive governance roles across private companies, not-for-profit organisations and regulated entities, serving in positions including Chair, Committee Member and Company Secretary. He brings a strong commitment to community engagement and social impact and is a Founding Director of the Airtime Assist Foundation, a not-for-profit organisation that works with migrant and refugee youth through basketball, creating pathways to education, scholarships, vocational training and meaningful community integration. Daniel also works closely with philanthropic families and charitable organisations, assisting with governance, strategic planning and long-term stewardship to help create lasting social and community outcomes.

Qualifications

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

Professional associations

- Member of the Institute of Chartered Accountants in Australia and New Zealand
- Fellow of the Chartered Institute for Securities & Investments

Professional licenses

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

Daniel is authorised to provide Tax (Financial) Advice Services through SW Wealth; these services relate only to the tax implications of the financial product advice we provide under our Australian Financial Services Licence (AFSL). Any other tax agent, accounting, bookkeeping or business tax services fall outside of Tax (Financial) Advice Services and are not provided under your engagement with SW Wealth. If you choose to receive those services, they will be delivered under a separate engagement with SW Accountants and Advisors, with their own terms, scope and fees.

This Adviser Profile forms the second part (Part 2) of SW Wealth's Financial Services Guide (Guide) (25 August 2026). This contains important information about your financial adviser, and it should read in conjunction with SW Wealth's Guide (Part 1).