Entrust

Adviser Profile

Duncan MacKintosh, CFA

Private Wealth Adviser
Representative (No. 458414)

With over 20 years of experience, Duncan has developed a true passion for delivering risk adjusted investment portfolios with an emphasis on accommodating his client's personal circumstances and needs. In addition to private clients, his ability to identify investment themes and opportunities has seen him build a loyal client base of family offices and Not-for-profit organisations.

Graduating in 1998 with a Bachelor of Commerce from the University of Western Australia, Duncan began his career as an equities analyst for DJ Carmichael. This experience helped him forge a considered and analytical investment approach, which he further developed as a Senior Investment Adviser at Macquarie Equities.

Seeking a more comprehensive solution for his clients, Duncan joined Entrust in 2014. At Entrust, Duncan is able to leverage off the deep resources of the broader group to complement his investment management with personalised strategic advice. Via this team approach Duncan is able to deliver a truly bespoke and comprehensive wealth solution by advising and dealing in:

- Savings plans and deposit products
- Superannuation
- Self-managed superannuation funds
- Retirement planning
- Managed investment schemes including Managed Discretionary Accounts (MDA)
- Securities, debentures, and bonds
- Margin lending facilities
- Life insurance

Duncan has earned the Chartered Financial Analyst (CFA) credential and is a member of the CFA Institute. In addition, Duncan has completed a Graduate Diploma of Applied Finance and a Diploma of Financial Planning. He also has extensive knowledge and experience with derivatives having completed Level 1 and 2 of the Accredited Derivatives Advisers Program.

Duncan's focus is the management of investment portfolios across a broad range of assets including:

- Direct Australian equities;
- International equities;
- Alternative assets;
- Fixed interest and yield based assets,
- Listed property;
- Managed funds and;
- Exchange-traded funds.

Once a clear understanding of a client's needs, objectives and risk profile has been achieved an agreed investment mandate will be established. Duncan will then combine quantitative filters with qualitative analysis to construct and manage an appropriate investment portfolio for those clients.

Duncan's passion and investment competence saw him elevated to the position of Chief Investment Officer (CIO) for Entrust. In this role he coordinated the Investment Committee in building and managing model portfolios for use by the group's Advisers. Having built this infrastructure Duncan has recently stepped back from this role to allow him focus his attention on his client base where he enjoys building long term relationships and helping his clients meet their long-term investment objectives.

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