ORD MINNETT

Jack Fosdike

Private Wealth Adviser

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.

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Qualifications

- Graduate Certificate in Business Administration, Royal Melbourne Institute of Technology
- Advanced Diploma of Financial Planning, Monarch Institute

Areas of Advice

- Asset Allocation
- Investment strategies
- Securities
- Managed investment schemes
- Life risk insurance
- Retirement planning
- Superannuation & SMSF

Background

Jack has a diverse background with over 10 years of experience across retail banking, commercial banking, and financial services. He also spent several years working across multiple states for a major Australian consumer business. These experiences gave him valuable insight into how people spend and save their time and money. Despite the wide variety in people's careers, interests, and priorities, Jack believes that everyone ultimately seeks connection and protection.

He recognises that no two clients are the same. Jack's approach to financial advice is highly personalised, with a focus on making complex concepts easy to understand, regardless of a client's financial background or investment knowledge.

Jack is particularly eager to help his clients, from young professionals to retirees, including self-managed super funds (SMSFs) where appropriate. He is committed to helping clients better understand the superannuation landscape and how it can support their long-term financial goals.

He has significant experience in investment portfolio construction and asset allocation and understands the importance of structuring investments based on thematic preferences and ethical considerations.

Jack's view is that his role goes beyond providing advice. To him, it's about developing meaningful relationships, built upon trust, where clients can feel supported and confident in their investment decisions.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research