

ORD MINNETT

Jake Blumberg

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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D: 02 8216 6359
E: jblumberg@ords.com.au

Ord Minnett
Grosvenor Place
Level 18, 225 George Street
Sydney NSW 2000
ords.com.au

Connect with me on [Linkedin](#)

Qualifications

- Bachelor of Commerce (Economics & Finance), The University of Notre Dame Australia
- Graduate Diploma of Financial Planning, Kaplan Professional

Certifications

- Accredited Derivatives Adviser Level 1

Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies
- Life risk Insurance
- Redundancy / early retirement
- Retirement planning
- Superannuation & SMSF

Background

Jake is a Private Wealth Adviser focused on helping Australians meet their wealth goals and live comfortably in retirement.

Growing up in the Byron Bay region and moving to Sydney to pursue his passion for financial markets, Jake is dedicated to helping people create and protect their wealth. Before joining Ord Minnett more than five years ago, Jake gained experience with the Commonwealth Bank in their Import and Export Finance team.

Since joining Ord Minnett, Jake has benefited from collaborating with senior private wealth advisers, providing him with diverse market insights and wealth management skills that he now uses to assist his clients in achieving their financial aspirations.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research