

ORD MINNETT

Jeremy Ferrer

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.



Jeremy Ferrer

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Qualifications

- Graduate Diploma in Financial Planning, Victoria University
- Graduate Certificate in Financial Planning, Victoria University

Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies
- Retirement planning
- Superannuation & SMSF

Background

Jeremy became a Private Wealth Adviser in 2024, bringing with him a background in working with national-level and professional athletes in the fitness and sport sector.

Inspired by the significant impact of holistic financial advice, Jeremy transitioned to wealth management, first gaining operational experience before becoming a qualified Financial Adviser. His diverse experiences bring a unique and client-focused perspective to his holistic approach. Jeremy builds trusted relationships with high net worth individuals and families based on integrity and personalised service. His primary areas of expertise include providing tailored investment advice, strategic asset allocation, and comprehensive superannuation and retirement planning.

Jeremy begins by deeply understanding each client's unique circumstances and financial goals, then develops and implements bespoke financial strategies with ongoing monitoring and reporting to help them achieve their objectives.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research