ORD MINNETT

Jordan Berger

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 Diploma of Financial Planning, Kaplan Professional
- Diploma of Financial Planning, Kaplan Professional
- Bachelor of Economics, The University of Sydney

Areas of Advice

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

Background

Jordan has been a Private Wealth Adviser since 2018 and brings over 14 years of experience in the financial services industry. He is dedicated to supporting clients both in Australia and internationally. Motivated by a passion for helping clients grow and protect their wealth, Jordan aims to be a trusted partner in their long-term financial success.

He delivers bespoke investment solutions and tailored financial strategies that empower his clients to build, grow, and preserve their wealth across generations. With a client-first approach and deep industry knowledge, Jordan offers personalised solutions that adapt to the investment world's ever-changing landscape. His main areas of expertise include portfolio construction and management, providing comprehensive investment advice and strategy, navigating superannuation and self-managed super funds (SMSFs), and delivering holistic financial planning.

As a standard process, Jordan works closely with clients to refine their most important objectives before engaging with their accountant to establish an appropriate investment structure and strategy for long-term success.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research