ORD MINNETT

Sam La Cava

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.

Sam La Cava

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Qualifications

- Graduate Diploma of Financial Planning, Kaplan Professional
- Master of Applied Finance, Kaplan Professional
- Bachelor of Economics (Finance & Econometrics), The University of Sydney

Certifications

- National Designated Trading Representative (DTR) Accreditation, Stockbrokers and Investment Advisers Association (SIAA)
- Accredited Derivatives Adviser Level 1 & 2
- Margin Lending
- Superannuation

Areas of Advice

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

Background

Since commencing his tenure at Ord Minnett in 2010, Sam has accumulated a broad range of experience through assisting wholesale, institutional, and private wealth client teams.

In his role as a Private Wealth Adviser, Sam serves a diverse group of clients, including ultra-high net worth individuals and pro bono clients. Sam's practice focuses on individuals and families in various financial stages, from those actively building wealth to those commencing or already in retirement. The core of his service lies in asset management and superannuation guidance.

Sam aims to establish himself as a trusted adviser, dedicated to helping clients achieve their specific financial objectives through tailored strategies encompassing the full spectrum of financial markets, investment choices, and practical financial solutions.

Financial Planning

Investment Advice & Strategy

Portfolio Construction & Management

Portfolio Reporting & Administration

Superannuation & SMSF

Stockbroking

Retirement Planning

Philanthropic Giving

Investment & Market Research