

ORD MINNETT

Jake Brown

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.



Jake Brown

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Ord Minnett

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Qualifications

- Bachelor of Commerce (Finance)
- Bachelor of Economics (International Trade and Finance)

Certifications

- Accredited Derivatives Adviser Level 1

Areas of Advice

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

Background

Jake has over a decade of financial markets experience across roles in New York, Melbourne and now the Sunshine Coast.

Since joining Ord Minnett in 2022, Jake has established a successful private wealth business offering clients strategic solutions and investment access to all major asset classes.

Jake began his career as an intern for a global shipping company before joining a boutique firm in Melbourne where he held roles in corporate advisory, portfolio management, equity research and funds management. Jake has managed portfolios for retail and sophisticated investors across Australia providing access to direct equities, managed funds, hybrids and corporate bonds.

Originally from Central Queensland, Jake returned north in 2022 to join the successful team in Sunshine Coast where he intends to continue the firm's long-standing practice of offering high quality service for the remainder of his career.

Jake provides tailored advice across a range of areas including Australian shares, fixed interest, international shares, managed funds, exchange traded funds, cash management services, leveraged investments, initial public offerings (IPOs) and other capital raising opportunities.

Specific areas of expertise include superannuation including self-managed super funds (SMSFs), retirement planning and other wealth creation strategies for high net worth investors.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research