

ORD MINNETT

Jaime Ferrer

Senior 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, Securities Institute of Australia
- Professional Diploma in Stockbroking, Stockbrokers Association of Australia
- Master of Business Administration, Asian Institute of Management (Philippines)
- Bachelor of Science in Business Administration, De La Salle University (Philippines)
- Bachelor of Arts, De La Salle University (Philippines)

Areas of Advice

- Asset allocation
- Financial advice
- Investment strategies

Background

Jaime has a distinguished financial advice career extending over 35 years. He possesses significant expertise in providing tailored financial advice to ultra-high net worth individuals and families.

Jaime has established long-standing client relationships founded on trust and a steadfast dedication to helping them achieve their financial objectives. For many clients, he has provided continuous guidance for close to three decades, assisting them through various market conditions and now supporting them with intergenerational wealth transfer. Jaime's primary areas of expertise encompass investment advice, retirement planning, and facilitating smooth wealth transitions for families and future generations. His approach begins with a thorough understanding of each client's unique circumstances and financial aspirations, leading to the development of bespoke and holistic financial strategies.

Jaime employs strategic asset allocation, implements tailored investment advice, and provides ongoing portfolio monitoring and reporting, often collaborating with accountants and solicitors to ensure optimal outcomes for his clients. He is also a Master Practitioner Member of the Stockbrokers and Investment Advisers Association (SIAA) and a Fellow of the Financial Services Institute of Australia.



Financial
Planning



Portfolio Reporting
& Administration



Retirement
Planning



Investment Advice
& Strategy



Superannuation
& SMSF



Philanthropic
Giving



Portfolio Construction
& Management



Stockbroking



Investment &
Market Research