

**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

Private Wealth Adviser

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## Qualifications

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

## Certifications

- Accredited Derivatives Adviser Level 1

## Areas of Advice

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

## Background

Jake is a Private Wealth Adviser on the Sunshine Coast with over a decade of experience in financial services.

Jake specialises in crafting retirement planning, superannuation, and portfolio management solutions specifically designed to preserve and grow substantial assets for high-net-worth individuals, families and businesses. With a deep understanding of both financial planning principles and effective investment strategies, he provides tailored advice that directly aligns with each client's unique long-term financial goals and desired lifestyle.

Prior to his current role, Jake built a diverse foundation in Melbourne across corporate advisory, portfolio management, investment analysis, and funds management. This breadth of experience underpins his disciplined, client-focused approach to managing wealth and delivering long-term outcomes.



Financial  
Planning



Portfolio Reporting  
& Administration



Retirement  
Planning



Investment Advice  
& Strategy



Superannuation  
& SMSF



Philanthropic  
Giving



Portfolio Construction  
& Management



Stockbroking



Investment &  
Market Research