ORD MINNETT

Jake Blumberg | Sam La Cava

Private Wealth Advisory Team

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.

A collective approach

Jake and Sam prioritise listening to their clients and having a deep understanding of their objectives before providing them advice. This ensures clients receive coherent and comprehensive financial planning advice that is underpinned by ongoing investment advice.

The team follows a process for its clients:

1. **Set goals and assess finances** – Identify financial objectives and analyse your current financial situation.
2. **Create and implement a strategy** – Develop tailored financial plan and put it into action.
3. **Monitor and adjust as needed** – Review progress regularly and adapt to changes. With your consent we can take you to a higher level of the process.

About the team

Jake and Sam are dedicated to delivering tailored investment solutions that align with your financial situation and goals, empowering you to achieve long-term prosperity through our advice.

They have a combined 20 years+ experience in financial services helping clients achieve their needs and objectives. The team offers comprehensive financial advice, which includes investment portfolio management and financial planning advice and services.

Jake started at Ord Minnett in 2019, specialising in helping Australians achieve their wealth goals and live comfortably in retirement. He grew up in Byron Bay and has worked at the Commonwealth Bank. Sam commenced working at Ord Minnett in October 2010 and provides a comprehensive, personal, and ongoing commitment to understanding technical aspects in Australian and broader financial markets.

Areas of expertise

The team's focus is on delivering clients a personalised financial plan that reflects their specific needs and objectives, utilising Australian and international equities, fixed interest, wholesale bonds, term deposits, and cash management solutions.

Jake and Sam's services include stockbroking, investment advice and strategy, cash and term deposits, financial planning, superannuation and self-managed super funds (SMSFs), retirement planning, estate planning and alternative investments.

The benefits of partnering with Ords

Team of qualified experts
Our team are licensed professionals who are specialists in their field

Deep research and knowledge
Our Research Analysts continually survey local and global investment opportunities

Clarity and certainty
Our team have an ethical and legal responsibility to act in our clients' best interests

Tailored solutions
We delve deep to discover our clients' needs and tailor solutions to them

Partners who listen, then act
We take time to understand our clients' needs, then advise

Access to opportunities
We offer clients access to pre-market and wholesale investment opportunities

Jake Blumberg

Private Wealth Adviser

D: 02 8216 6359
E: jblumberg@ords.com.au

Connect with me on LinkedIn

Qualifications

- Bachelor of Commerce (Economics & Finance), The University of Notre Dame Australia
- Graduate Diploma of Financial Planning, Kaplan Professional

Background

Jake is a Private Wealth Adviser focused on helping Australians meet their wealth goals and live comfortably in retirement.

Growing up in the Byron Bay region and moving to Sydney to pursue his passion for financial markets, Jake is dedicated to helping people create and protect their wealth. Before joining Ord Minnett more than five years ago, Jake gained experience with the Commonwealth Bank in their Import and Export Finance team.

Since joining Ord Minnett, Jake has benefited from collaborating with senior private wealth advisers, providing him with diverse market insights and wealth management skills that he now uses to assist his clients in achieving their financial aspirations.

Sam La Cava

Private Wealth Adviser

M: 0413 717 528
D: 02 8216 6301
T: 02 8216 6300
E: slacava@ords.com.au

Connect with me on LinkedIn

Qualifications

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

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.

Adviser support staff

Nathan Cane, Private Wealth Assistant
D: 02 8916 0121
T: 02 8216 6300
E: ncane@ords.com.au

Start a conversation

Your first step to securing your financial future starts with a conversation.

You can contact **Jake** or **Sam** directly or find out more at ords.com.au

Ord Minnett
Grosvenor Place
Level 18, 225 George Street
Sydney NSW 2000

ORD MINNETT
Building wealth for generations

Private Wealth Advisory Team. June 2025.