ORD MINNETT

Jaime Ferrer | Jeremy Ferrer

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

Partnering with Jaime and Jeremy provides clients with a highly responsive and tailored service backed by a diverse range of expertise and experience to meet your financial needs. The team's collaborative approach integrates deep technical knowledge of investment strategies, retirement planning and intergenerational wealth transfer to provide individualised financial solutions to meet each client's unique objectives and aspirations. With a steadfast commitment to delivering exceptional client outcomes, the team ensures you receive holistic, forward-facing financial advice at every stage to help protect and grow your wealth.

About the team

With over 40 years of combined experience in the financial advice industry, Jaime and Jeremy have worked with ultra-high net worth individuals and families across Australia. The team have been successfully managing the complexities of significant wealth over many years for their diverse client base through ever changing market conditions.

Many clients have received continuous guidance for close to three decades, demonstrating the team's commitment to developing long-term client relationships founded upon trust and personalised service. Their in-depth knowledge and diverse experiences allow the team to service multi-generational family groups providing them with the highest levels of service and support as they navigate various life stages.

Areas of expertise

Jaime and Jeremy utilise their extensive experience alongside Ord Minnett's research and strategic advice teams to deliver the highest quality comprehensive financial advice. The team specialises in investment strategy, asset allocation, retirement planning and intergenerational wealth transfer, ensuring clients receive tailored advice at every life stage.

They take pride in engaging with accountants and solicitors to support achieving optimal client outcomes. This integrated approach enables the team to provide holistic and bespoke financial solutions to help clients protect and grow their wealth with confidence and clarity.

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

Jaime Ferrer

Senior Private Wealth Adviser

M: 0434 990 183
D: 02 8216 6541
T: 02 8216 6300
E: jferrer@ords.com.au

Connect with me on LinkedIn

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)

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.

Jeremy Ferrer

Private Wealth Adviser

D: 02 8216 6672
T: 02 8216 6300
E: jeferrer@ords.com.au

Connect with me on LinkedIn

Qualifications

- Graduate Diploma in Financial Planning, Victoria University
- Graduate Certificate in Financial Planning, Victoria University

Background

Jeremy became a Private Wealth Adviser in 2024, bringing with him a background in working with national-level and professional athletes in the fitness and sport sector.

Inspired by the significant impact of holistic financial advice, Jeremy transitioned to wealth management, first gaining operational experience before becoming a qualified Financial Adviser. His diverse experiences bring a unique and client-focused perspective to his holistic approach. Jeremy builds trusted relationships with high net worth individuals and families based on integrity and personalised service. His primary areas of expertise include providing tailored investment advice, strategic asset allocation, and comprehensive superannuation and retirement planning.

Jeremy begins by deeply understanding each client's unique circumstances and financial goals, then develops and implements bespoke financial strategies with ongoing monitoring and reporting to help them achieve their objectives.

Start a conversation

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

You can contact **Jaime** or **Jeremy** 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. September 2025.