

**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

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Connect with me on [LinkedIn](#)

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### 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

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### 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

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### Start a conversation

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

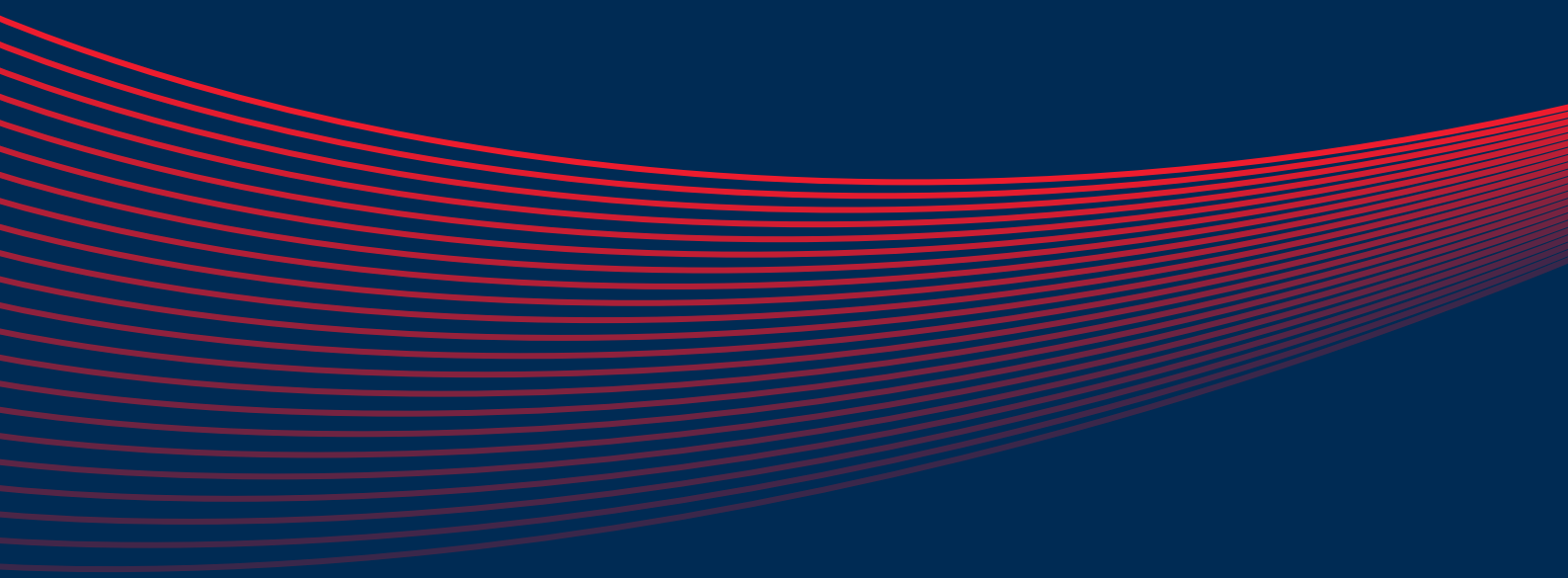
You can contact **Jake** or **Sam** directly or find out more at [ords.com.au](https://ords.com.au)

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Your success *backed  
by our expertise*





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