ORD MINNETT

Michael Egan | Jake Blumberg

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

Michael and Jake provide comprehensive investment advice and financial planning strategies to a diverse range of individuals, families and organisations.

The team begins by understanding your complete financial position, personal circumstances and long-term objectives. From there, they develop a tailored investment and advice strategy designed to align with your goals, risk tolerance and income requirements.

Through ongoing portfolio management, proactive communication and regular reviews, Michael and Jake help clients navigate changing market conditions and remain focused on long-term outcomes. Their approach combines experience, discipline and accountability, creating a trusted partnership built around protecting capital, generating sustainable returns and supporting the successful transfer of wealth to future generations.

About the team

Michael has over 25 years of experience advising clients through varying market cycles, having held senior roles at Merrill Lynch, UBS and now Ord Minnett. His focus is on developing sophisticated investment strategies that align with each client's unique objectives. Jake joined Ord Minnett in 2019 after previous roles with Commonwealth Bank and Deloitte. He brings a contemporary perspective to wealth management, combining investment expertise, strategic thinking and technology-driven portfolio solutions.

Together, they provide clients with the benefit of seasoned experience, fresh perspectives and long-term adviser continuity, helping families preserve and grow wealth across multiple generations.

Areas of expertise

The team's expertise includes Australian and international equities, fixed income investments including wholesale bonds and term deposits, managed funds, alternative investments and cash management solutions. They also provide advice relating to superannuation, self-managed super funds, retirement planning, estate planning, intergenerational wealth transfer and broader wealth structuring strategies.

Supported by Ord Minnett's research capabilities and a disciplined investment process, Michael and Jake construct portfolios tailored to each client's objectives and risk profile. Their focus remains on preserving and growing wealth, while helping clients and their families make informed financial decisions with confidence.

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



Michael Egan

Senior Private Wealth Adviser

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Connect with me on LinkedIn

Qualifications

- Bachelor of Economics, The University of Sydney
- Diploma in Export Management, College of International Business
- Diploma of Financial Planning, Financial Planning Association

Background

Following a successful career at large accounting firms, Michael now has more than 25 years of experience working in financial markets at Merrill Lynch, UBS, and now Ord Minnett. He structures his advice, strategies, and products to meet the specific needs of his clients.

Michael is an economics graduate from The University of Sydney, a qualified Chartered Accountant and financial planner, with financial accreditation to trade in local and international markets and derivatives.



Jake Blumberg

Private Wealth Adviser

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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 six 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.

Start a conversation

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

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

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Ord Minnett Limited ABN 86 002 733 048 (Ord Minnett) holds AFS Licence Number 237121.

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