

Why AV Trinity?

Heritage

Originally the wealth management arm of a general insurance brokerage in Tunbridge Wells, we started life as Amilcroft Financial Management in 1996.

In 2000 we moved away from Amilcroft and became Alexander Vidler, a fully independent IFA.

In 2009, we moved to our current offices and we became AV Trinity - one of the few Chartered Financial Planning firms in Tunbridge Wells.

We have 2 main directors and 3 non-exec directors

- Louise Morris, Managing Director - has worked for AV Trinity for over 20 yrs
- Cliff Patterson, Director & Chartered Financial Planner - is also responsible for fulfilling our professional compliance requirements.
- Mike Subert ACA FCA, Finance Director (non-exec) – Was an accountancy tax partner for many years.
- John Kings, (non-exec) – has over 30 yrs experience as a corporate & employment lawyer.
- Jonathan Grimshaw MBE, (non-exec) – Has spent many years in the healthcare and charities sector.

Our advisers are backed up by an experienced Client Support team.

How we work

As one of Kent's largest and oldest established IFAs we advise clients on their holistic financial need as well as those with highly specialised requirements. To ensure that we are the right IFA for you, and for you to get a feel for what we do, an initial meeting with AV Trinity will always be at our cost and we advise with clarity, sensitivity and discretion. We consider it a privilege to advise clients from the local area and further afield, and have a strong sense of community and support local charities.

Awards

We are Chartered Financial Planners, one of only around 800 in the UK. This is the “gold standard” of financial planning and demonstrates our determination to provide the best advice possible.



Why not call in for a coffee one day to find out more about how we can help you. You have nothing to lose but much to gain!

Contact us
01892 612500 or 0800 668 1898
info@avtrinity.com www.avtrinity.com



“Intelligent, Independent Financial Advice”

All information has been prepared with care to ensure accuracy and is based upon our understanding of legislation and HMRC practice, which can be subject to change. This is intended to provide information only and should not be considered as advice.