Our Commitment to You

Overview

AV Trinity works with a wide range of clients. They include those with a sudden influx of funds either through a catastrophic injury award or a divorce settlement; those who become wealthy over time, perhaps through the establishment and running of a business, and family stewards who are involved in making the often difficult and complex decisions that come from managing family wealth.

We understand the value that professional financial advice can add for our clients and we provide a comprehensive bespoke advice service which is tailor-made to suit you we recognise that everyone is different.

Regular Review Meetings

- A complete review of your financial roadmap
- A structured approach to ongoing advice

Telephone and Email Access to your Adviser

- We endeavour to respond promptly, but will address the urgency of a given situation.

Managing your Assets

- A strategy driven by your needs & objectives
- Ongoing portfolio monitoring
- Written portfolio valuations

Financial Partner Co-ordination

- With your permission, we provide updates for your accountant and/or solicitor
- Recommend other suitable financial professionals where the need arises
- Ensure a co-ordinated, approach to your financial strategy.

The Philanthropic Service

- Work closely with your tax advisers
- Provide advice on charitable giving
- Access to our network of specialist charitable and legal advisers

The Inter-generational Planning Service

- Work alongside your solicitor and other advisers
- Advice on family wealth “cascading” solutions

The Retirement Planning Service

- Work with your accountant
- Pension review and/or consolidation service
- Pension Investment Strategy
- Options and advice on taking an income from your pension and/or preserving for the next generation.

Ideas Box Service

- Provide counsel for new ideas, whatever the source

Simplify your Financial Life

- Provide guidance regarding necessary records and those that can be disposed of.

In conclusion

Clients view us as their trusted financial partner. Our role is providing guidance and resources to help them make informed choices now and into the future.

Choosing a financial adviser is one of the most important decisions you will ever make, so take your time and choose wisely. Why not call in for a coffee to find out more about the services that we can offer. An initial meeting is at our cost.

Please Contact us

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Chartered Financial Planners

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