

## How we work with our clients

### Overview

For over 25 years AV Trinity have been serving the financial needs of clients in Kent and further afield, and we now look after over 1000 active clients in the UK, and in excess of £350m of assets.

As one of only about 800 IFA firms in the UK who have been awarded Chartered Financial Planners status, we are well placed to deal with both the holistic and specialist areas of financial advice.

We recognise that changing your IFA or engaging with one for the first time is an onerous task and you may need to consider some of our qualities –

- We are totally independent
- We are a Chartered Financial Planning firm
- We give advice rather than selling “products”
- We have a team of male & female advisers
- We are big enough to specialise, but small enough to care
- We offer an initial cost-free meeting
- We are one of the longest established IFAs in Kent
- We are advisers and charges fees as opposed to earning a commission payment
- We only have salaried advisers who are not driven by commission
- We have strong relationships with many legal and accountancy firms

### In conclusion

We hope you will take the time to explore our website and find more details about the people who work for AV Trinity as well as a lot of useful information including other Factsheets that can be downloaded with our compliments. I hope we get the chance to meet one day as you may have much to gain and nothing to lose ....



We would love you to call in for a coffee to talk more about how we work and how we might help.

Please contact us on 01892 612500

[info@avtrinity.com](mailto:info@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.*