

2018 – Memorable Moments at AV Trinity

Some highlights that we would like to share



New colleagues

Amber Burton, Rob Neary and Jack Finch have joined AV Trinity over the last 12 months.

Helen Carey has joined as Head of Advice & Compliance. She has worked in Financial Services for over 20yrs and is a Fellow of the PFS, a Member of the Chartered Inst for Securities & Investments, and a Chartered Financial Planner. She is also a Senior Examiner for the CII Risk Management papers.

Congratulations!

Professional development

AVT encourage & fund the development of technical knowledge via exams set by the Chartered Insurance Institute. The 2018 achievements were-

- **Louise Morris** – JO2 (Trusts). Attended the graduation ceremony to recognise her qualifying as a Chartered Financial Planner.
- **Julie Lavers** – Now a Resolution Accredited Specialist and 2018 Retirement Planner of the Year (Women in Financial Services Awards).
- **Sarah Demmon** – Fellow of the PFS also AF2 (Business Financial Planning), JO2 (Trusts) and AF1 (Taxation).
- **Frank Harewood** – Now a Chartered Financial Planner also AF2 (Business Fin Planning), AF4 (Investment Planning)
- **Louise Baughan** – AF1 (Personal Tax & Trusts)
- **Phil Kurzeja** – AF4 (Investment Planning)
- **Bryn Evans** - AF1 (Taxation) and JO2 (Trusts)
- **Amber Burton & Dan Easton** - (RO5 Protection)
- **Rob Neary** – RO5 (Protection) & RO1 (Regulations & Ethics)
- **Beth Wood** – ER1 (Eq Release), AF5 (Advanced Financial Planning), J10 (Discretionary Investment Management).



The Equity Release Council

AV Trinity are Corporate Members of the Equity Release Council who promote the highest standards of expertise & ethics in the field of Equity Release. We have 7 appropriately qualified experts in this field.

- **Julie Lavers, Sarah Demmon, Phil Kurzeja, Helen Carey, Louise Morris, Cliff Patterson and Louise Baughan**



Press & Media recognition

As in previous years there were several occasions when national newspapers specifically asked AV Trinity to comment on financial matters and in 2018 both **Louise Morris and Julie Lavers** were featured in the weekend Money Pages of two national "broadsheets".



Professional seminars

We held several professional seminars during 2018 in order to help local solicitors and accountants. This year the sessions focused on pensions, a highly technical subject, but one that we are well placed to deliver.

- **April** - 140 people attended the Trinity Theatre where our special guest was **Sir Steve Webb** who, in his previous role as Pensions Minister, was one of the main architects of the current Pension Freedoms regime.
- **May** - we hosted 4 **Pension Basics** workshops in our offices.
- **December** – 40 local professionals joined us for a **Retirement Seminar** at the Spa Hotel and enjoyed a lively and thought-provoking session.

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Charitable highlights

Supporting local charities is dear to the hearts of all who work at AV Trinity and the involvement of our colleagues this year was phenomenal.

- **Kit Wilson Trust – Richard Randall** gave a home to **Gracie (above)**, a rescue dog from the KWT. We have supported Kit Wilson for many years and will continue to do so.
- **A Quiz Night** - at the Nevill Golf Club the evening resulted in donations of over £6,000 being made to two local charities and we thank all the local solicitors, accountants and bankers who supported this charitable event.
- **The Trinity Theatre** – AV Trinity are still a major corporate supporter of the Trinity Theatre.
- **“Reverse Advent Calendar”** – organised by **Beth Wood** and this involved all staff bringing presents and food donations into the office during December which were then packed in decorated boxes and delivered by Beth to a homeless shelter in Maidstone.
- **Close to Hand** – an idea from **Sarah Collins** who organised the writing of a large number of cards for **Close to Hand** who send Christmas greetings to people in local care homes who were without family at this time of year.
- **Hospice in the Weald** - Once again **Louise Morris** took up the challenge of raising in excess of £1,000 for the Hospice by running the 10k challenge in September.



Community involvement

Giving back to the local community is important and we have been serving the local area for over 25yrs. In 2018 we concentrated on helping the younger generation.

- **School initiative** – during 2018 we became involved with a local grammar school to help the pupils with a basic understanding of personal finance. Several presentations were made by **Louise Morris and Helen Carey** and we have committed to providing help during 2019 for especially those studying Economics and Business Studies.
- **Skillsfest** – a Tunbridge Wells event that we were asked to attend. Over 1,000 6th year pupils from local Kent schools came along to speak to local key employers about careers opportunities. **Beth Wood and Sarah Collins** were the AVT hosts at this event.
- **Georgia Pearch** - Since 2015 we have supported Georgia, a young T Wells footballer who plays for Charlton Ladies Football Club.



Our refurbished office

2018 saw us enjoying our newly refurbished offices despite suffering a flood from a burst pipe in April !



The AV Trinity Corporate Profile

We continue to develop our corporate profile

- **Company video** - In Dec 2018 we finalised plans to shoot a corporate video which is designed to show what we do and how we do it. It should be completed by Feb 2019 and will be on the AV Trinity website at www.avtrinity.com
- **Social Media** – We embrace social media in a positive fashion in order to share news about finance, events and notable achievements at AVT. The number of AVT “followers” continues to rise and you can do likewise by clicking the icons at the bottom of our home-page.

Website – www.avtrinity.com

Facebook - AV Trinity LTD

Twitter - @AVTrinityLtd



Instagram - avtrinityltd

Youtube - AV Trinity Ltd

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