

The way to financial clarity

Our Investment Management and Financial Planning Service







Bringing clarity to the financial side of life.

Wherever you are in life we're here to support you.

For more than 30 years individuals, professionals and families have trusted us to help them confident financial choices. Whether it's putting in place savings and investments strategies, managing wealth, enjoying retirement or paving the way for future generations.

We believe clarity is key – it's the bridge to the trusted and enduring relationships we build with our clients and it shapes our core services around investment management and financial planning.

Our approach is strategic – recognising the essential relationships that exist between our clients, their investment managers and their professional advisers. Our research led; multi-asset class investment management services are geared to generate the best possible returns for each client. Our financial planning services are considered and long-term in outlook – designed with financial freedom and security in mind.

Across the UK - from Chichester to Edinburgh and Bristol to London, our investment managers and financial planners are set up to offer financial clarity for the way you live today and for what you hope in the future.

Working together, for you

We know you'll have priorities and dreams for the future. That's why we've created an integrated Investment Management and Financial Planning Service. Designed to fit to and evolve with your needs, our service has the flexibility to be tailored specifically for you. As a client you can expect clear, consistent advice and solutions that save you time and free you up to enjoy life.

Your Financial Planning and Investment Management team will collaborate continuously, from building and evolving your financial plan to selecting and managing your investments. Experts in their fields, they'll work hand in hand at every stage of your financial journey and join the dots for you, so you have complete oversight and assurance, both now and into the future.

As a client, you'll get to know the entire team that is supporting you – in addition to your Investment Manager and Financial Planner, you'll know the client services team supporting the management of your wealth, by name.

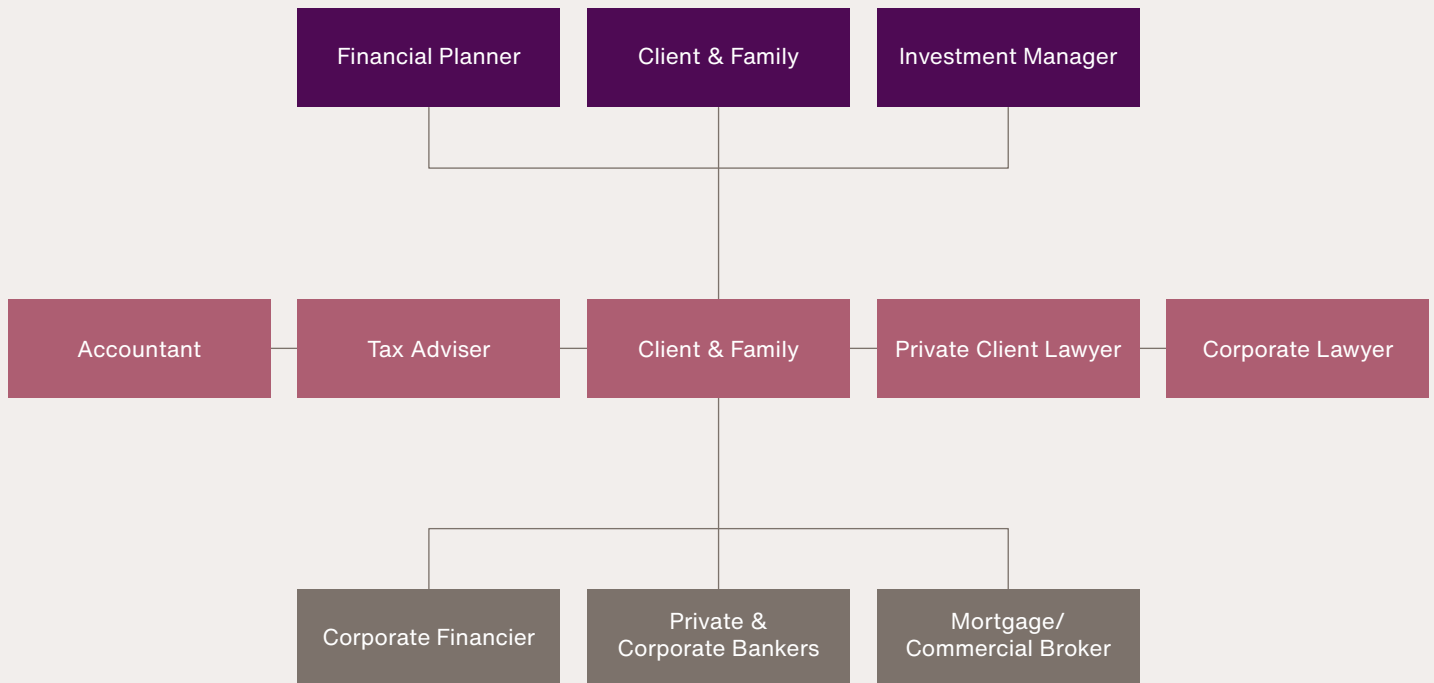
If you need specialist advice in other areas, such as accountancy or law, we can make recommendations using our UK-wide network. And if you have existing professional advisers, we will be glad to work in unison with them to reach the best outcomes for you.

Respected and well-connected within their communities, no matter your location our teams will always be ready to collaborate with your wider network of professional advisers.

Whether you come to us via our financial planning service or our investment management service, we are pleased to be able to offer you our integrated approach to both, so that you can reap the rewards of holistic wealth management.

We truly care about making a difference to your financial wellbeing, and hope we can guide you through important financial decisions and create the future you want with clarity and confidence.

An example of how we work together for you



Our clients' point of view

“TrinityBridge have managed our investments since retirement, and I have been completely satisfied with the service they provide and the results and impressed by the knowledge and application of their advisers.”

“I trust in the relationship I have with my advisers and will happily recommend them to friends and family.”

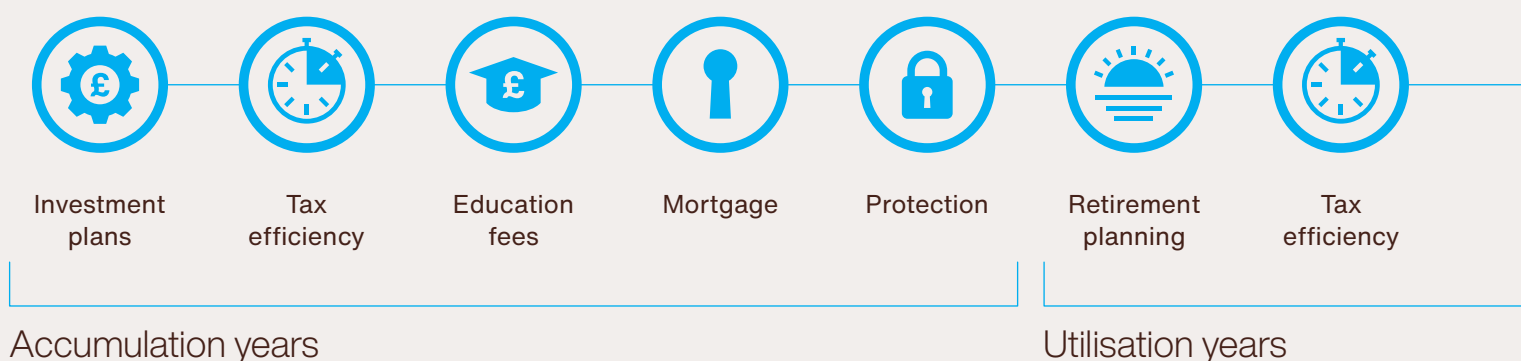
“They are completely reliable, and I trust that they know and advise us on the best way to manage our investments. They go out of their way to help us.”

Client feedback, 2024

Our integrated approach to wealth management

The experts who make up your Investment Management and Financial Planning team are there to support you and your needs. The constant dialog between us will result in a strong and sustainable professional relationship. Whether your team is TrinityBridge through and through, or you decide to maintain relationships with trusted external professional advisers, we will collaborate and share ideas, so your interests are always front and centre of everything we do.

← Early years



The way we work for you

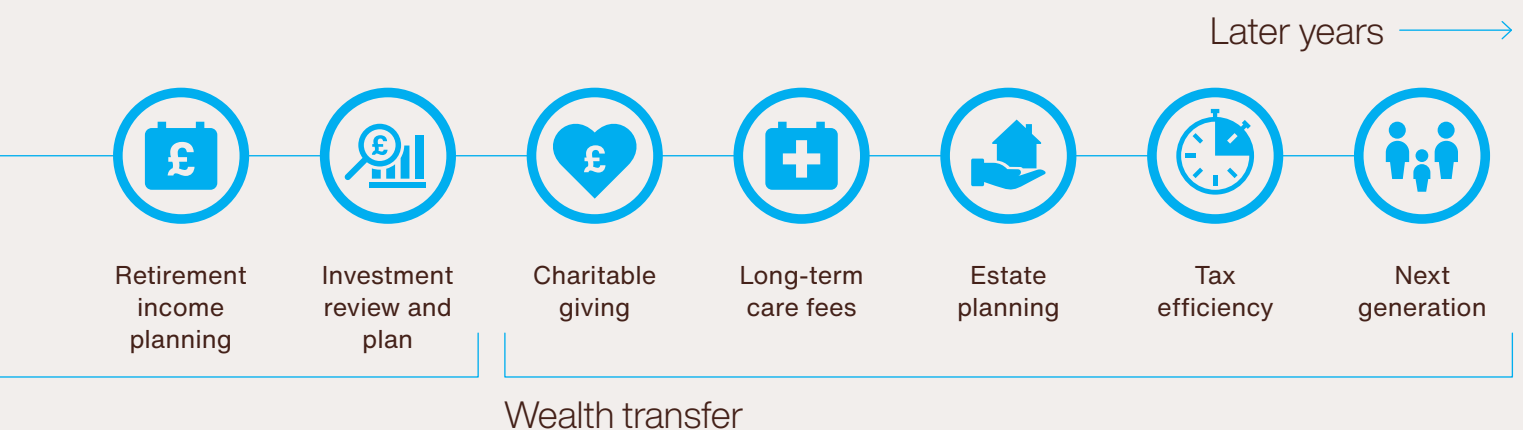
We've designed our services to grow with you, and adapt as your wealth, family and professional circumstances change. Your Financial Planning team will support you as you build your wealth, drawing on deep experience in managing and passing wealth on, as well as a continued understanding of yours and your family's situations. You can expect completely personalised financial advice and that we will handpick the best solutions that will help you thrive now and in the future.

Thoughtful investing

Life is constantly changing, which is why we believe in a thoughtful, strategic approach to managing your investments. As your personal and professional life unfolds, we'll be there to ensure your investments always align with your goals. From the moment we start working together, you can count on us to be on standby to make adjustments as life unfolds to ensure your portfolio is always on track.

Personalised planning

Everyone's vision of retirement is different, and we understand that. Whether you're dreaming of adventure, relaxation or a blend of both, we're here to help you prepare for the future you've always wanted. Our team is ready to support you in managing risk, structuring your wealth and maximising your income – whenever you're ready to start your next chapter.



Your estate

Planning isn't just about securing your finances; it's about making sure your loved ones are cared for in the future. Our team of experts will take the time to understand your priorities and walk you through your options, helping to reduce tax liabilities and ensure that when the time comes, your estate is passed on in the way you've always planned. Tax rules are subject to change. Any tax considerations will be dependent on your individual circumstance.

Future proofing for your family

Life can be full of surprises, but we're here to help you plan for the unexpected. By getting to know the details of your income and situation, we can select the right blend of protection solutions to help shield your family, your business and your income from any curveballs that may come your way in the future.

Property advice

Time is of the essence in the fast-moving world of real estate. Our Mortgage Advice Service will help you navigate even the most complex funding options and guide you through the entire application and purchasing process. With strong relationships with lenders we'll do our utmost to help you secure the property of your dreams. Your home may be repossessed if you do not keep up with repayments on your mortgage. You should be aware that not all buy-to-let mortgages are regulated by the Financial Conduct Authority (FCA). If you chose to take up such a mortgage, you will not have the means of redress associated with regulated mortgages in the event that you have any complaints.

A holistic service, built around you

“Every one of our financial planners and investment managers prides themselves on the depth and longevity of their client relationships. We see ourselves as stewards of the money you have worked so hard to build. That’s why we are so invested in ensuring every touchpoint is as seamless as possible, with you, with our internal team and the professional network around you.”

Nigel Stockton, CEO, TrinityBridge

Research

Our extensive in-house research team draws on a blend of proprietary and industry leading data sources to determine our house view and the rationale for every one of our investments. Our researchers regularly share insight with clients at meetings, webinars and events, and provide timely updates on the market impact of geopolitical, fiscal or economic developments.

Risk management

We see ourselves as stewards of our clients’ wealth, so risk is central to client discussions, investment decisions and portfolio construction. By drawing on leading industry frameworks, we assess the correlation between potential risk and returns, and our proprietary tools evaluate individual portfolios against multiple criteria to determine optimum returns for specified risk levels.

Stringent governance procedures ensure our teams act promptly to manage perceived or actual risk variants, so performance, risk and suitability align with client mandates.

Tailored reporting

As a client of TrinityBridge, you’ll receive a range of regular reports, from personal investment policy statements to detailed quarterly evaluations and annual tax packs. With intuitive data visualisation and concise summaries, all of our reports have been designed to make complex financial information accessible and give you a clear overview of your finances, key performance metrics, risk assessments and strategic insights. And your TrinityBridge advisers will be on hand to walk you through the insights and answer any questions you might have.

Our offices

Personal relationships stand at the heart of our business, and we have offices in some of the most dynamic areas across the UK. Our dedicated financial planners and investment managers look after clients across the whole of the UK, with local-market teams working seamlessly with our specialists to give you pertinent advice on technical financial planning considerations. We’re happy to meet with you wherever and whenever suits you best and can be available by phone, video call or in person.





Client community

As a client of TrinityBridge, you will have access to our growing client network which includes some of the UK's most successful professionals and entrepreneurs, charities and family businesses. We regularly bring our clients together regionally and online to learn from renowned speakers and to connect with each other. Many impactful introductions have been made through our network and our clients tell us that they benefit greatly as a part of our community.

The security of your assets

The security of your money and assets is paramount to us and our controls and processes are designed to provide a high level of reassurance.

Non-cash assets we hold on your behalf are registered in the name of our wholly owned and controlled nominee, Lion Nominees Limited (Lion) or are held by one of our approved custodians. Your money is held at a number of banks and credit institutions in client money accounts which are separate from our corporate accounts and are protected under statutory trust.

The Financial Conduct Authority, which regulates TrinityBridge Limited (the company you are contracted with), provides clear rules that require a strict separation of company and client money and assets. This means that your money and assets are ring-fenced so that general creditors have no legal right to these.

A little bit about us

There are more important things in life than wealth. But everything is easier and brighter when finances are secure.

True security comes from knowing that your future is in expert hands. Over the years, we have helped individuals, families and businesses across the UK define their goals and put the building blocks in place to achieve them.

We hope that you will see that TrinityBridge is a little different from other wealth and asset managers. We're established but entrepreneurial, we have a boutique feel with strong balance sheet. And as an independent business, we are truly invested in our clients.

No matter where you are on your financial journey, we will always start with you so that your financial plan and investment strategy really are personalised. And because we're invested in our clients' success, we have an extensive network of tried and trusted third-party strategists and professional advisers who we'll work with on your behalf if we feel your portfolio would benefit from specialist advice or solutions beyond our scope.

At a glance
870+ employees
90+ Financial Planners
80+ Investment Managers
*£23.1bn assets under management
15 established regional offices

* As of 31 January 2026

“Our clients stand at the heart of our business. Each of our clients has a unique story, requirements and hopes for the future, so we firmly believe the advice and solutions you receive should be built around you. Whether you need a full financial planning and investment management service, or for our experts to work alongside your established team of trusted advisers, we are on hand to provide a seamless and sustainable solution that frees you up to enjoy all you’ve worked hard for.”

Nigel Stockton, CEO, TrinityBridge

We would be delighted to talk

If you would like further information or to arrange an initial meeting, please get in touch.

For more details about TrinityBridge, our offices, and our people, please visit **trinitybridge.com**

Please be aware that no investment, or investment strategy, is without risk. The value of investments can fall as well as rise and you may get back less than you invested.

Telephone calls made to any member of TrinityBridge may be recorded.

For more information about how we use your data see **trinitybridge.com/privacy-policy**