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Individuals

Designed to help families meet their needs.

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Trinity's Mission Statement

To provide value added investment advisory services to institutions, individuals and their advisors. Trinity has a unique capability to provide custom strategies that can meet the faith and social concerns of their investors.

Your Process

We create strategies tailored to your needs and goals.

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Our History

Serving faith-based investing since 2005, we can help.

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Shared Values

Trust. Honesty. Faith. Integrity. We believe values matter, and we live by ours everyday.

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Vast Resources

Want to learn more about retirement, social security, or estate strategies?

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After he had finished speaking, he said to Simon, “Put out into deep water and lower your nets for a catch.” Simon said in reply, “Master, we have worked hard all night and have caught nothing, but at your command I will lower the nets.” When they had done this, they caught a great number of fish and their nets were tearing. Luke 5:4-6

Trinity is a proud sponsor of Catholic Values Investing Conference 2019.

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Meet our Professional Team

Our professional team can help you address your needs of today and many years to come. We look forward to working with you through all stages. We strive to deliver a portfolio that you can be proud to own.

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