



CONTACT US

## *About Us*



### Planning

Tred Avon Family Wealth provides planning services that range from single purpose such as retirement income or college funding, to all encompassing and ongoing lifetime financial planning. Whether you come to us for a formal plan, or want planning incorporated into your other services, we will adapt to you.



## Stewardship

Stewarding family assets can be complex. Wealthy families face unique challenges regarding wealth transfer, family legacy, philanthropy, trust oversight, wealth management education, and family business matters. Tred Avon Family Wealth assists in creating and executing strategies to address these challenges within families, leaving a clear path for future generations.



## Support

From investment portfolio oversight, to cash flow management, to bill paying, to consolidated reporting, we strive to customize and provide exactly what each client needs to support their wealth management needs. We will work with you and your other trusted advisors to give the support and guidance you need.

*Our Team*



## Elizabeth Spurry, President

Beth founded Tred Avon Family Wealth in 2014 to meet the unique needs of select high net worth clients. Previously a Senior Vice President at Wye Financial & Trust, Vice President at Mercantile Trust, and a Financial Advisor at H.C. Wainwright and Morgan Stanley Dean Witter, she has a Bachelor's degree from Johns Hopkins University and a Master's degree from Washington College. Beth is a Certified Financial Planner™ and Certified Trust and Financial Advisor, and has served on the Maryland Banker's Association Trust Committee.



Clients can choose a range of concierge services that best meet their family's individual financial needs.

- Investment and Portfolio Oversight
- Cash Flow
- Financial Reporting Consolidation
- Family Accounting
- Expense Management and Bill Paying
- Property and staff management
- Estate and Trust Planning
- Philanthropy, gifting and Impact Investing
- Family Business Consulting
- Advisor Coordination



Our goal is to provide each client with whatever services are needed to give them, and their family, financial peace of mind.

*"An investment in knowledge pays the best interest"*

*- Benjamin Franklin*

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SEND

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