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## TRICIO: NEW FIRM WANTS TO BE INVESTMENT BUDDY TO ADVISERS AND WEALTH MANAGERS

Three experienced investment professionals from an international private bank have joined forces to form a new advisory firm to provide support on investments for professional advisers and planners. Positioning themselves as an 'investment buddy', the new firm is set up to help professional investors on all aspects of the investment process.

Tricio Investment Advisors Limited has been set up by John Calverley, Gerry Celaya and Dr James Chu CFA. The three principals of Tricio met whilst working at American Express Bank in London, providing investment research, strategy and solutions to the bank's investment advisers, professional institutional clients and high net worth clients.

With decades of experience through most aspects of the international investment process working for American Express, Standard Chartered, HSBC, Bank of America and other companies, they formed Tricio to offer similar independent investment support to advisers, wealth managers and paraplanners in the UK.

The company supports professional advisers, wealth managers and paraplanners on portfolio construction, product selection, solution development and much else. The firm also works with corporate clients on market risk management and other complex investment solutions.

Tricio's emphasis is on close working relationships with clients, providing tailored solutions to meet their needs. Rather than trying to produce "one size fits all" materials, the three principals of Tricio want to be highly accessible as investment buddies to support clients at all times.

Tricio's core analysis starts with in-depth economic research applied to international markets (Economics for Investment). The output of the analysis forms their independent outlook on different markets and asset classes, which is then combined with quantitative modelling to form the basis for asset allocation and investment strategies. All proposed portfolio strategies will be independent and actionable by advisers and clients. Clients who receive the full consulting service from Tricio will have the research tailor made to fit their requirements.

Dr James Chu, CEO and Head of Investment Solutions of Tricio said "I have been working with John and Gerry for nearly two decades now in various companies. I can see how we can join force and apply our knowledge and international financial market experience to create a unique offering to support wealth managers, advisers, companies and planners, both in the UK and internationally."

At a time when financial advisers and wealth managers need to demonstrate value to investors, they can strengthen their proposition through the unique combination of Tricio's international experience and highly personalised approach. More information on Tricio's service offering can be found on their website: <https://www.tricio-advisors.com/services>. The firm can also be followed on a dedicated page on LinkedIn (<https://www.linkedin.com/company/tricio-advisors/>).

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For all media enquiries, please contact [info@tricio-advisors.com](mailto:info@tricio-advisors.com).

**Tricio Investment Advisors Limited**  
[www.tricio-advisors.com](http://www.tricio-advisors.com)

Registered address: 9/10 The Crescent, Wisbech, Cambs, PE13 1EH  
Company registration number: 12495435  
VAT registration number: 349230109

[info@tricio-advisors.com](mailto:info@tricio-advisors.com)