



# ANNOUNCEMENT NEW TEAM MEMBER

May 2026

Trio Wealth Management, LLC is pleased to announce the addition of Charlotte Bell to the team!

Charlotte joins Trio Wealth as a Wealth Advisor. Charlotte will partner with senior advisors, clients, and their families to develop comprehensive financial plans tailored to each stage of life. She will support financial planning, investment strategy implementation, and ongoing relationship management to help clients stay aligned with their long-term goals.

Charlotte earned a Bachelor of Science in Finance with a minor in Communications from George Washington University, graduating summa cum laude. She was also a member of George Washington University's Division I women's tennis team. Charlotte began her career with J.P. Morgan Private Bank in Palm Beach, FL, where she worked as an Analyst for two years following graduation. She plans to pursue the Certified Financial Planner® designation over the next year.

A Northern Virginia native, Charlotte grew up in Great Falls and will be relocating to Miami, Florida in Fall 2026.

Charlotte can be reached at [charlotte@triowm.com](mailto:charlotte@triowm.com), 571.297.7273



#### **Trio Wealth Management**

774A Walker Road, Great Falls, VA 22066

Michelle Phone 703.459.9171

Kevin Phone 703.459.9176

Lauren Phone 571.470.0071

Charlotte Phone 571.297.7273

[info@triowm.com](mailto:info@triowm.com)