GROWTHINVEST

GrowthInvest is an adviser-focused platform, specifically designed to simplify the research, investment and management of tax-efficient and alternative investments including EIS and SEIS funds, VCTs and IHTs.

The platform allows advisers to consolidate historical assets and portfolios in one workspace, giving portfolio-level and individual investment analytics in an easy-to-use format.

OUR MISSION

We are on a mission to make tax-efficient and private investments more accessible to wealth managers, financial advisers, and their high-value clients, through the provision of digital solutions and education in a fast-growing but currently inefficient market.

THE ALTERNATIVES MARKET IS GROWING:

- Pension lifetime allowance & reduced tax-free contributions
- Divestment of property assets and CGT obligations
- We are seeing increasing estate values & IHT liabilities
- We believe there is an opportunity to deliver real returns
- Exciting and potentially disruptive opportunities
- Advent of ISA millionaires'[1]

BUT IT STILL FACES SIGNIFICANT CHALLENGES:

- Clients require education to increase awareness
- Difficult to research and advise on whole-of-market
- Requirement to diversify portfolios across multiple providers
- Inefficient, paper-driven administration
- Lack of transparency and reporting
- Opaque and complex fee structures

INTERESTED IN FINDING OUT MORE?

Our dedicated client service team are always on hand to talk. For a demo of the GrowthInvest platform or to discuss your tax-efficient business, please get in touch.

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[1] 'Assets That Have Created ISA Millionaires' (FT Adviser, February 2019)

THE GROWTHINVEST SOLUTION

Access and research a diverse range of tax efficient and alternative investments using state-of-the-art secure technology

- Market-leading range of investment offers including EIS/SEIS, VCT, IHT and other alternative products

- Independent research reports from recognisedproviders to conduct due diligence and evaluate the merits of a given offering

- Extensive library of educational materials, industry news and video content, including our award-winning webinar series: The Adviser Hour (CPD-qualifying)

Invest into diversified multi-product portfolios using one secure online portal

- No execution fee: investments through the platform will not be more expensive than direct fund subscriptions

- Advanced filtering tools enable easy construction of diversified portfolios across multiple product providers

- One-time setup of client accounts online means repetitive administration of paper subscriptions are a thing of the past

- Fast subscription processing quickly and efficiently by leveraging online, pre-populated application forms with e-signatures

One transparent reporting solution across a selection of tax efficient and alternative investments

- Consolidate reporting on EIS, SEIS, VCT, IHT and alternative assets in one online secure portal

- Onboard historical assets to provide a complete reporting solution for your clients

- Ensure investments are put to work to meet client specific deadlines, due to greater transparency on any outstanding monies pending deployment

- Drill-down functionality to view individual company holdings within any fund manager investment

- API and data feed integrations to existing third-party back-office systems

- Ongoing partnerships with our clients to deliver on bespoke reporting requirements

Digital administration solutions to save vital time

- Corporate branding or white label options

- Bespoke panel creations and ongoing maintenance of pre-approved investments

- Platform activity tracker monitors client activity and provides an audit trail to demonstrate market research

- Multi-client upload functionality with online ID, KYC & AML checks

- Restriction of platform access privileges at firm or client level

- Digitalised document library maintained throughout entire lifecycle of all investments

- Tools, to assist advisers with their tax calculations, HMRC administration, client suitability and MiFiD II reporting.

Personalised client service: because technology is not always enough

- Experienced team from institutional backgrounds with a focus on adding value to our clients and sharing expert knowledge in tax efficient and alternative products.

Our aim is to become the adviser's trusted assistant in:

- Providing education on the market and the attractive tax benefits available

- Delivering bespoke solutions for tax planning

- Constructing portfolios from a range of product providers, highlighting deployment timelines and diversification

- Efficient delivery of tax forms to facilitate investor HMRC tax refunds

- Hosting and organising bespoke educational events to educate clients and increase awareness which can be company or client focused.

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