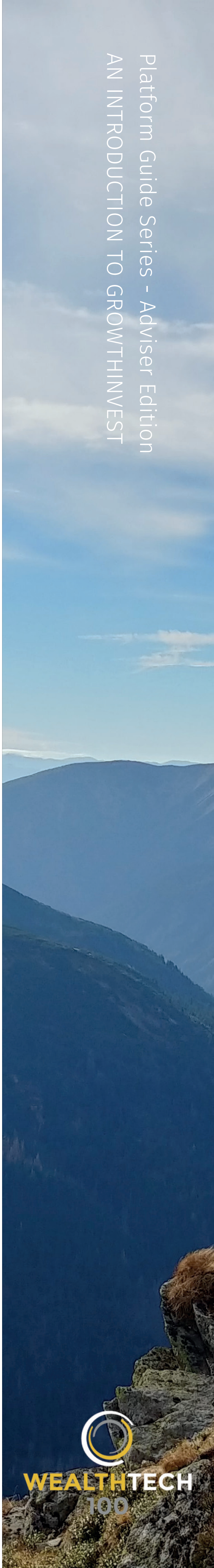
GROWTH
INVEST

Platform Guide Series - Adviser Edition

AN INTRODUCTION TO GROWTHINVEST



GROWTH INVEST

AN INTRODUCTION TO GROWTHINVEST

EFFICIENCY / SCALE / CONTROL

At GrowthInvest, we make tax-efficient and private investments more accessible to wealth managers, financial advisers, and their high value clients. We provide tailored digital solutions enabling efficient execution and ongoing administration of private asset portfolios, alongside the ability to consolidate and onboard existing assets.

We give you a single clear view of all of your client's alternative investments.

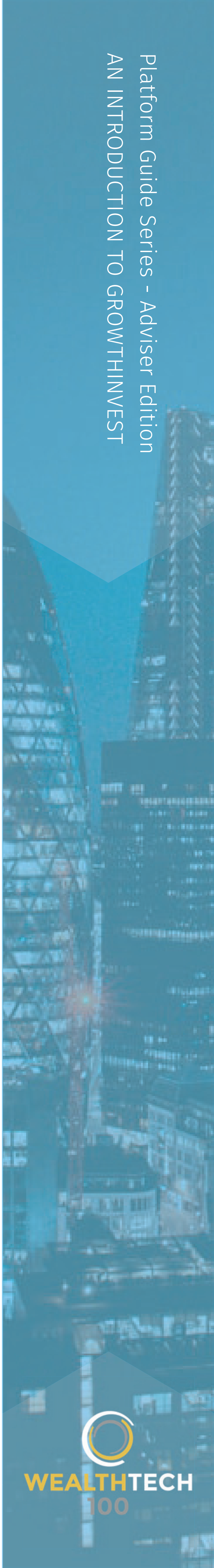
Our aim is to drive increased engagement with the alternative and tax efficient industry by providing a platform that mitigates barriers to growth, such as inefficient paper driven administration, lack of clear transparency around fees and costs, and difficulties in diversifying portfolios.

GrowthInvest provides advisers and wealth managers with transparency, efficiency, and control around their alternative advice proposition for the first time. This gives significant cost savings to our clients alongside giving them the confidence to grow this area of their business.

Our overall mission is to empower our clients to access alternative asset solutions without barriers, by providing choice, transparency, oversight and education alongside continuous innovation and excellent customer service.

OUR CORE OFFERING

- A market-leading range of investment offers including EIS, SEIS, VCT, IHT and other Private Market investments
- Reporting on all alternative assets in one online secure portal (including the onboarding of historical assets)
- An extensive library of educational and research materials
- Digital administration solutions alongside innovative products, such as our diversified VCT Service, and IHT "Fund of Funds"
- A clear basis to meet existing and future regulatory requirements for FCA initiatives within the UK such as Higher Risk Investments and Consumer Duty
- All underpinned by our strong belief in excellent, personalised client service



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THE GROWTHINVEST SOLUTION

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

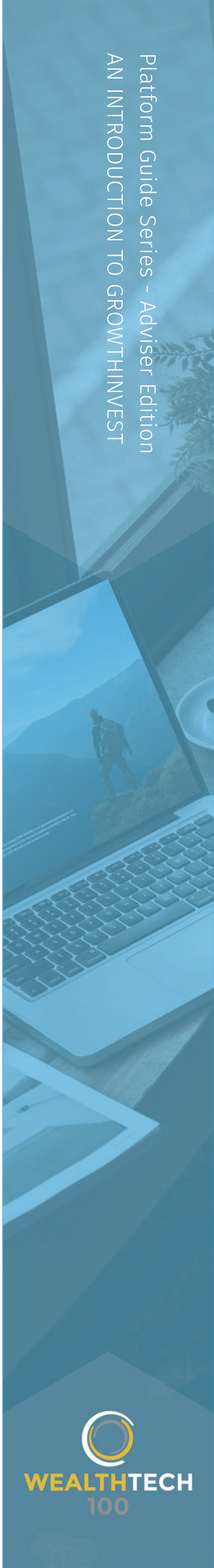
- Market-leading range of investment offers including EIS/SEIS, VCT, IHT, and other alternative and private market products
- Comparison tools, alongside independent research reports from recognised providers, to help conduct due diligence research and evaluate the available offers
- Extensive library of CPD Qualifying educational materials, industry news, exclusive interviews, and other video content, including our award-winning webinar series **The Adviser Hour**

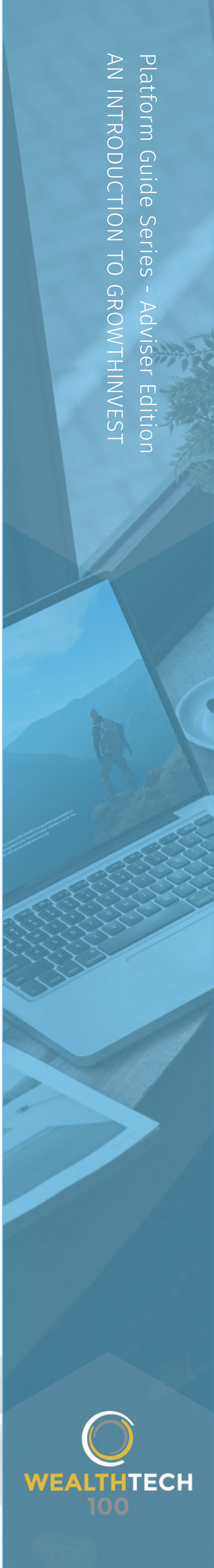
Invest into diversified multi-product portfolios using one secure online portal

- Advanced filtering tools enable easy construction of diversified portfolios across multiple product providers
- One-time setup of client accounts online means repetitive administration of individual application forms, and managing multiple portal logins, become things of the past
- Applications are processed quickly and efficiently by leveraging online, pre-populated forms with digital signatures
- All applications are easily tracked on our live interactive dashboards

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 entire portfolios, including historical assets to provide a complete reporting solution for you and your clients
- Drill-down functionality to view individual company holdings within any fund investments
- Full transparency on all aspects of an investment, from monies awaiting deployment through to receipt of tax certificates
- API and data feed integrations to existing third-party back-office systems and industry providers
- Daily price and valuation updates (via our partners Morningstar)
- Full suite of customisable client reports





Digital administration solutions to save vital time

- Customisable branding suite and options, including custom url options
- Bespoke panel creations and ongoing maintenance of pre-approved investment panels
- Predefined user roles ensure appropriate access and control for all staff
- Client Visibility Groups provide an easy-to-use means of setting up and controlling client access
- Multi-client upload functionality with online ID, KYC & AML checks
- Digitalised document library maintained throughout entire life-cycle of all investments, including all tax certificates
- 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 within the tax efficient and alternative investment space
- 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 time-lines and diversification
- Hosting and organising bespoke educational events to educate clients and increase awareness

WEALTHTECH 100

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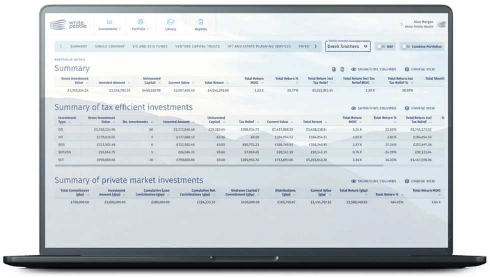
A CLEAR VIEW OF YOUR PORTFOLIO

Our analytical tools will help you get a complete detailed understanding of your clients' portfolios.

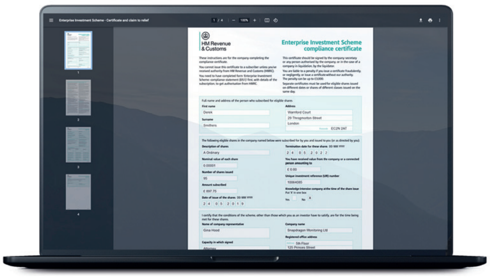


PORTFOLIO SUMMARY

All your client's investments in one place

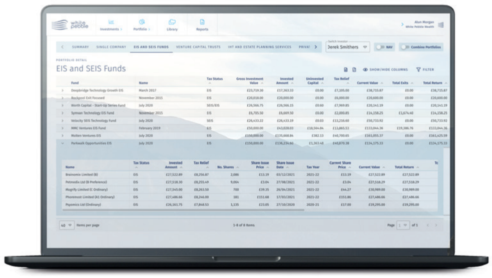
INTERACTIVE CHARTS & REPORTS

Filter and analyse by tax year, fund manager and more



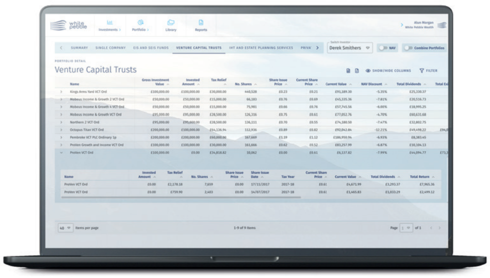
DOCUMENT LIBRARY

All applications, tax & share certificates, in one place



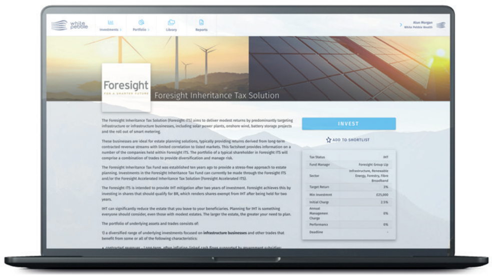
INVESTMENT DETAIL

Drill down to investee company for EIS, SEIS and BR funds



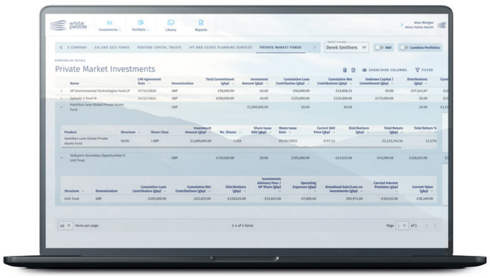
DAILY PRICES FOR LISTED PRODUCTS

Configurable reports, including NAV for VCTs



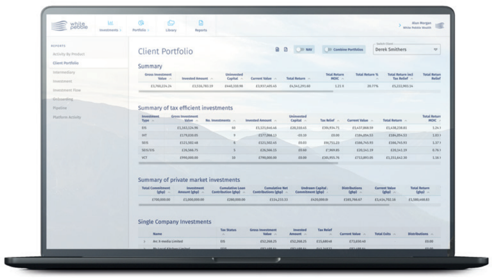
PRODUCT PAGES

All the latest information on every investment offer



PRIVATE EQUITY FUNDS

Transactional level detail, fully integrated

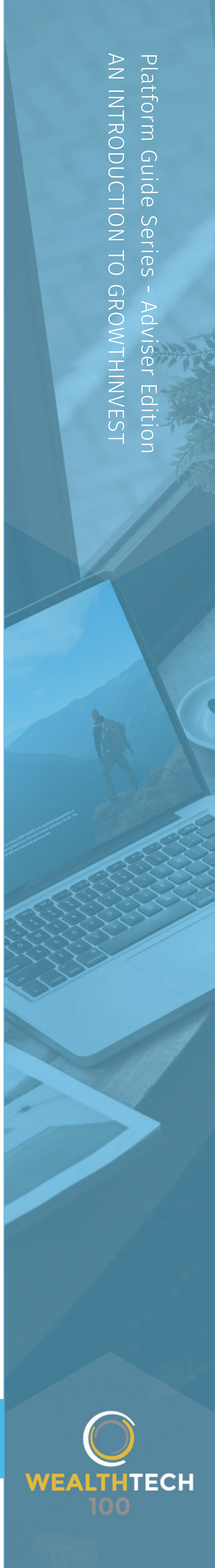


DOWNLOADABLE REPORTING

PDF and Excel downloadable portfolio reports

The GrowthInvest mission is to make tax efficient and private investments more widely accessible to wealth managers, financial advisers and their clients, through the provision of digital solutions and education in a fast-growing market.

Explore more at www.growthinvest.com



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