



GROWTH INVEST



Platform Guide Series - Adviser Edition

GROWTHINVEST: KEY INFORMATION SUMMARY

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WEALTHTECH
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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.

GrowthInvest gives you a single clear view of your clients' alternative investment portfolios.

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

DID YOU KNOW...

One of the key ways to maximise the benefits of the GrowthInvest platform is to transfer on the rest of a client's alternative portfolio. This provides a great basis for further investment decisions, including our rolling VCT reinvestment solution, as well as ensuring a single account for the flow of dividends and exits, and bringing all administration, reports and documents under one roof.

Our experienced onboarding team of analysts will ensure that every client portfolio is accurately reflected with the latest valuations, full transactional history, and is backed by all the relevant documentation. This provides the starting point for the ongoing support of the portfolio, using our well-established reporting lines across the entire market.

Best of all, we manage the whole process from start to finish. Please contact us to find out more.





CONTACT & COMMUNICATIONS

The GrowthInvest Client services team are available to help with your questions and queries at any stage and are able to offer interactive help (via screen share) as required.

GrowthInvest Client Services

The Client Services team can be contacted as follows:

Email: clientservices@growthinvest.com
Tel: 0300 303 0037
Platform: Via on-platform contact forms

Additional GrowthInvest Contacts

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ADDITIONAL RESOURCES

GrowthInvest has a suite of collateral for both advisers and clients which are designed to help guide users through the client portal from the very first login. We regularly update and add to the overall library. We believe the documents linked below should provide a good starting point though please do not hesitate to contact us with any questions, or to arrange some formal or informal training sessions:

Adviser - Platform Guides



INTRODUCTION
TO GROWTHINVEST



SETTING UP
A CLIENT ACCOUNT



MAKING
AN INVESTMENT



UNDERSTANDING THE
CLIENT PORTFOLIO

Adviser - Technical Solutions



VCT SERVICE ROLLING
REINVESTMENT PROGRAM



TRANSFERRING &
ONBOARDING ASSETS



SETTING UP AN
INTERMEDIARY USER



PLATFORM BRAND
CUSTOMISATION

Adviser - Technical Guides

Client - Platform Guides



ACCOUNT SET UP
AND LOGIN



MAKING THE MOST
OF GROWTHINVEST



UNDERSTANDING
YOUR PORTFOLIO



GROWTHINVEST
FEES & CHARGES

Support

If you have any questions, please do not hesitate to contact the GrowthInvest Client Services team **via the portal**, by email at clientservices@growthinvest.com or call us on 0300 303 0037.



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