

# GROWTH INVEST

Platform Guide Series - Client Edition  
MAKING THE MOST OF GROWTHINVEST



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## A better way to view your alternatives portfolio

The GrowthInvest platform allows our clients to consolidate historical assets and portfolios in one place. Administration is simplified with portfolio level and individual investment level analytics and reporting in an intuitive and easy-to-use format.

### KEY BENEFITS



#### A clear view of portfolio performance

- Advanced portfolio analytics and reporting
- Adjustable and flexible reporting formats
- Daily price updates
- Performance by sub asset class, manager, Investment and more



#### Intelligently build your portfolio

- The tools you need to build an efficient portfolio
- A clearer view on deployment timing
- Build diversification easily by product, geography, Manager etc
- Whole of market access



#### Efficient administration & monitoring

- A digital application process
- All documents in one place
- One account for investment proceeds including realisations, dividends and coupons
- No need to deal with multiple providers to collate information
- Tax related information in one place when you need it. e.g. EIS3 certificates

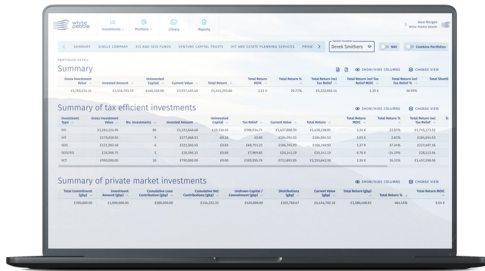


#### Efficient liquidity management

- All proceeds from all investments flowing to one account
- An efficient reinvestment process
- Access to secondary markets in VCTs
- True transparency on cash returns
- Enabling potential tax relief benefits

## A CLEAR VIEW OF YOUR PORTFOLIO

Our analytical tools will help you get a complete detailed understanding of your portfolio.



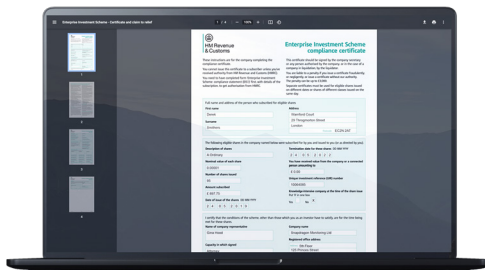
### PORTFOLIO SUMMARY

All your investments in one place



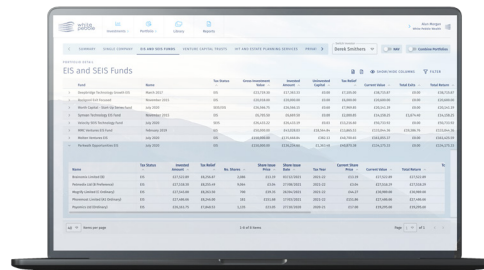
### INTERACTIVE CHARTS & REPORTS

Filter and analyse by tax year, fund manager and more



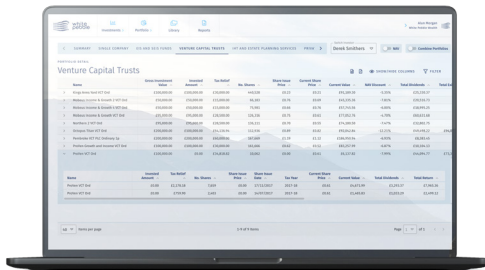
### DOCUMENT LIBRARY

All applications, tax & share certificates, in one place



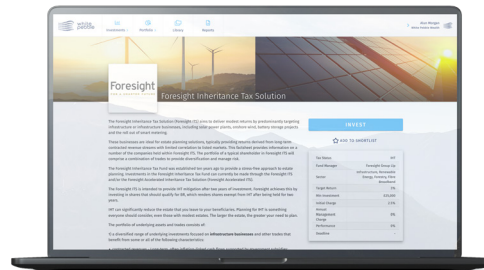
### INVESTMENT DETAIL

Drill down to investee company for EIS/SEIS



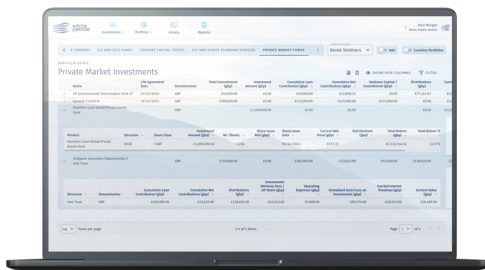
### DAILY PRICES FOR LISTED PRODUCTS

Configurable reports, including NAV for VCTs



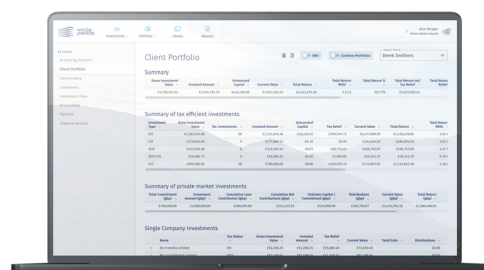
### PRODUCT PAGES

All the latest information on every investment



### 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](http://www.growthinvest.com)

## IMPORTANT

Investing in start-ups and early stage businesses involves risks, including illiquidity, lack of dividends, loss of investment and dilution. It should be done only as part of a diversified portfolio. GrowthInvest investments are targeted exclusively at investors who understand the risks of investing in early stage businesses and can make their own investment decisions. Pitches for investment are not offers to the public and investments can only be made by members of GrowthInvest on the basis of information provided in the pitches by the companies concerned. We take no responsibility for this information or for any recommendations or opinions made by the companies. We are unable to provide advice, unless you register as a Professional Client. This document is not directed at or intended for publication or distribution to any person (natural or legal) in any jurisdiction where doing so would result in contravention of any applicable laws or regulations. Please note that any above investments can only be made after an investor has received the full information memorandum and completed an original application form.

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## 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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