



GROWTH INVEST

the Alternative Investment Platform

Book a demo today:
Telephone 0300 303 0037
enquiries@growthinvest.com

INTERESTING FACT
On average, total client assets are >15% higher than first estimated by the wealth management firm.

the Case Study

the Client

- Rated as one of the UK's Top 25 financial adviser firms*
- >400 clients using EIS, VCT, IHT, Private Equity and Private Credit
- >£75m in historical investments, executing £11m per annum
- Using GrowthInvest as an integrated solution for all Tax Efficient & Alternative Investments since 2022

our Solution

- Corporate-branded client portal
- Fully digital client and investment application process
- Access, research and invest in over 100 tax efficient or private market products
- Maintain the firm's panel of approved investments for their clients (including single company EIS Investments)
- Provide a consolidated view of all clients and their holdings with comprehensive reporting, including full transactional level data, and integrations via API with 3rd party systems
- Centralised document portal holding all documentation including HMRC forms
- Dedicated account management team
- Standard platform fee model and facilitated adviser fees

client Problem

- Disparate sources for research, execution and reporting
- Client portfolios were recorded on spreadsheets with tax forms held in paper files
- No centralised post-investment support & documentation
- Heavy reliance on multiple in-house administrative staff
- No integration with existing back office systems



the Extras

Bespoke solutions delivered for this client

- Enhanced client portfolio analysis tools
- Enhanced trade lifecycle visibility
- Co-branded user guides & support collateral

INTERESTING FACT
Many clients found dividend payments that they had not received, or identified investments upon which they had not claimed tax relief

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* The firm was part of FT Adviser Top 100 2022 (see <https://2022top100.ftadviser.com/>)