

2016 / 2017

# engage

## Advertising & Partnership Opportunities

The ultimate promotional tool for fund managers wanting to reach financial advisers, wealth managers and intermediaries

intelligent.  
partnership\*

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# Our Mission



At **Intelligent Partnership**, we want to make alternative investments as understandable and accessible as mainstream assets, creating a more open and efficient market for everyone.

As the **UK's leading provider** of education and research on alternative investments, we increase awareness and engagement amongst intermediaries so they can recommend them with confidence. Insights are delivered year-round through a programme of content that includes digital and printed reports, video content, and live events.

There are already over **6,000+** advisers, wealth managers and financial services professionals in our subscriber community. All are interested or active in alternative investments. This total is continually growing through joint promotion of content with our affiliate and media partners and coverage resulting from our ongoing PR activity.



intelligent.  
partnership\*

# What is Engage?

*How can it help you?*

Providers find it increasingly difficult to cut through established relationships and differentiate themselves in a competitive marketplace.

Engage is a **partnership programme** which enables you to maximise your reach and exposure to the intermediary community

Complementing marketing activity, supporting business acquisition and informing product design, it helps you meet the needs of intermediaries through ongoing awareness and education while promoting your brand, products and services.

We offer a number of partnership and sponsorship opportunities in our reports, at our events and via our newsletters and marketing activity.

# Programme

**Intelligent Partnership** has created a multi-channel platform for delivering invaluable insight across digital, print and live media.

Designed to help market leaders differentiate themselves in a competitive marketplace, **engage** consists of a year-long programme of content, events and associated promotional campaigns, providing business development and branding opportunities for our partners.

## 2016/2017 Programme

We produce these initiatives, publications and events across the sectors we cover:



Bespoke & Industry Reports



Growth Investor Awards



Investment Briefing



Round Tables



Masterclasses



Showcases



Alternative Investment Summit



Video Content

# Profile & Reach

Extend your reach and enhance your industry profile by collaborating on content and associated PR and marketing activity.

To enable you to achieve a range of objectives, we offer both Scheduled and Bespoke options for participation throughout the year:

## **Scheduled**

There are a number of opportunities to align your brand with industry insight, education and excellence including: structured advertorials and manager profiles in our reports, speaking opportunities at our regional Masterclasses and national Summit, as well as the potential for major recognition through our prestigious annual Growth Investor Awards.

## **Bespoke**

Video content, roundtables, and bespoke reports are designed in collaboration with partners to achieve key objectives. You can target particular attendee or audience profiles in specific locations at certain times of the year, or commission independent research reports to educate prospective clients.

## PR opportunities with our partners

As a participant in our Engage programme, you can benefit from PR opportunities associated with our reports and events throughout the year.

Supported by our PR partner, **Citigate Dewe Rogerson**, we can work with you to create press releases – with discounts on distribution to Citigate’s extensive press database.

Our media partners, **Money Marketing** and **Fund Strategy**, also support our PR campaigns for the Alternative Investment Summit and Growth investor Awards with coverage of key announcements.

Our alternative investment content and related PR has been featured and promoted in the following:



ANGEL  NEWS

eisa   
enterprise investment scheme association

FT ADVISER

fundstrategy

IFA  
magazine



INVESTMENT WEEK

investors  
CHRONICLE

global  
investor

MoneyMarketing



Panacea Adviser

PORTFOLIO  
ADVISER

Professional Adviser



Technical  
CONNECTION

threesixty

unbiased.co.uk  
the home of professional advice

What Investment  
FOR A WEALTHIER FUTURE

FINANCIAL  
PLANET

FT FINANCIAL  
TIMES

Telegraph

thewealthnet  
Essential wealth management information

# CPD Accreditation

We're committed to delivering balanced, technical and informative content to our subscribers, which is why our reports, training and events have been awarded CPD-accreditation from the following trade bodies:

- › **Chartered Insurance Institute (CII)**
- › **Chartered Institute for Securities & Investment (CISI)**
- › **Personal Finance Society (PFS)**

“ Intelligent Partnership’s events and reports meet the standards we expect from both content and delivery – they are high quality, informative and demonstrate dedication to raising professional standards. It is for these reasons the CII is pleased to accredit them for CPD purposes. ”



## Tamsin Mills

Director of Accreditation Services, CII

“ The CISI is pleased to confirm its accreditation of these Masterclasses. Intelligent Partnership continues to respond to the needs of financial planners in understanding the full range of investment sectors. These events and Intelligent Partnership’s reports provide informative and balanced structured CPD in an accessible format. ”

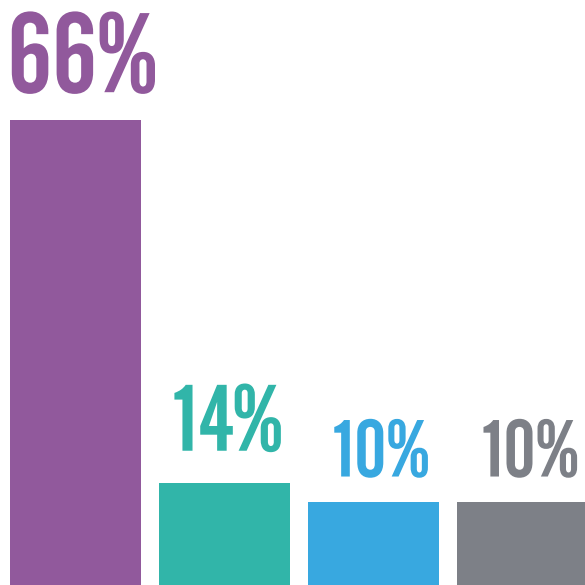


## Sam Rees-Adams

Director of Professional Standards, CISI

# Community

While our reach spans the wider industry, everything we do is designed to educate intermediaries and empower them to confidently discuss and recommend alternative investments.



**IFAs and Wealth Managers** attend our events, read our reports, read our briefings and claim CPD

**Industry Professionals** provide venues for our events and thought-leadership for masterclasses and reports

**Investment Providers** sponsor our content and events to educate advisers and participate in our Roundtable events and Growth Investor Awards

**Media Partners & Service Professionals** use our data, content and research to add value to their readers/members

## Real-time data on 30,000 intermediaries

Our partnership with **Matrix Solutions** significantly increases our reach, providing access to real-time data on over 30,000 intermediaries nationwide.

# Industry Reports

Our reports offer partners an opportunity to present themselves as thought leaders to our community of financial advisers, wealth managers and intermediaries.

## What areas do our reports cover?

The Alternative Investment Report Series launched in 2014 with our well-received and now award-winning EIS Industry report, followed by industry reports on BPR, VCT and Alternative Finance. This annual series will also include Structured Products, AIM Investing, Smart Beta and Angel Investing.

## Why are these a great opportunity for our partners?

Distinguished by high production values, rich content and extensive readership, our reports are accredited by the CII, CISI and PFS for structured CPD. They are free to download, carried widely in the trade press, promoted extensively via our affiliate network and supported by the relevant trade bodies.

## How intermediaries rated our latest report

---



**54%**

are more likely to get involved with BPR as a result of reading the report



**97%**

rated the report as "excellent" or "very good"



**98%**

would recommend the report to a colleague



**96%**

would like further education on tax-efficient investments

Flip through our reports! click on them to view



EIS 2016



AIM 2016



STRUCTURED PRODUCTS 2016



SMART BETA 2016



BPR 2016



VCT 2015/16



2,500+  
UNIQUE  
DOWNLOADS



6,000+  
REPORT  
READERSHIP



12  
MONTHS  
SHELF LIFE



3,000  
PRINTED  
COPIES

[VIEW THE ENTIRE COLLECTION ONLINE](#)

# Report elements

The full contents of our industry reports are set out in a detailed scope and vary from asset class to asset class, but they always include:

## 1. Introduction

includes an opening statement from a leading industry thinker, executive summary and key findings

## 2. Overview

sets out the investment case, history and development of the sector and explanation of how the products work

## 3. Advising On...

looks specifically at the issues that impact on advice, including planning ideas, regulations and the risks and benefits

## 4. Market Research

including surveys and in-depth interviews with advisers, providers and investors

## 5. Industry Analysis

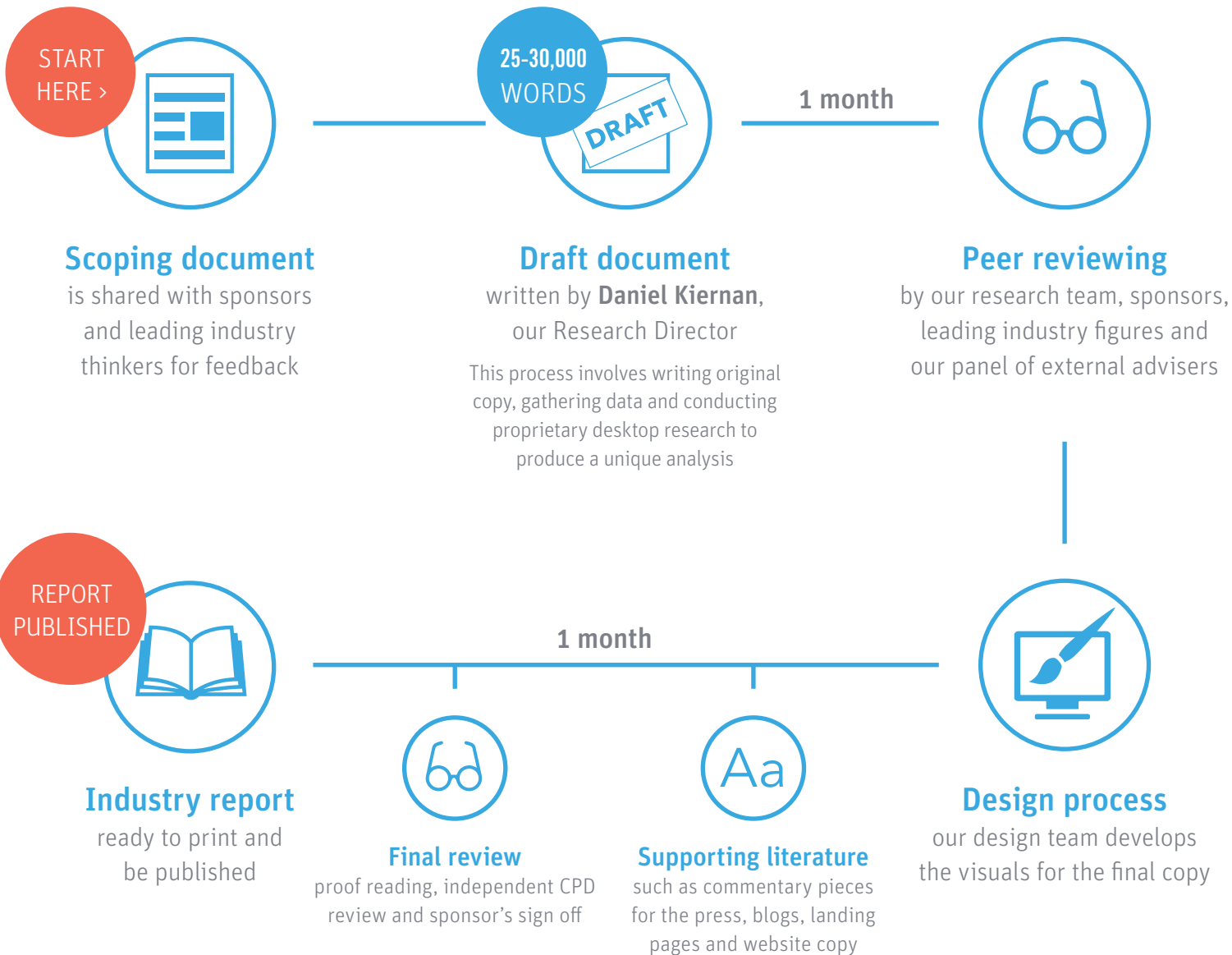
analysis of the investment options available and their key features

## 6. Report Conclusions

summing up the key findings and looking ahead to consider what the future might hold for the industry



# The report production process



# Adviser testimonials on our reports

“ Excellent piece of research; something which has been lacking within this area and industry. Since reading, we have distributed the report widely through our network as a must-read educational document. ”



**Tony Mudd**  
St James's Place

“ A very informative. Ideal for use with clients. ”



**Patrick Finnegan**  
PFP Wealth Management LLP

“ I have found this report very useful covering many aspects of EIS. Nice to see statistics and average charges in the report too. I have saved the report for future reference as it will be a useful resource to refresh my knowledge. ”



**Damian Oke**  
Ochard House Ltd

“ A comprehensive factual report that provides a great reference point. ”



**Robin Chamberlayne**  
Progressive Strategic Solutions LLP

“ With so much government backing and the economy now improving, this is a great time to look at these investments. Intelligent Partnership's insightful and incredibly thorough report is a must read for anyone interested in EIS investing. I will be recommending this to my high net worth clients. ”



**Robert Stell**  
Bradbury Stell

“ The report is very well put together in a clear and concise manner. It takes away a lot of the myths around this sector and makes it clear that it is and will be a growing market. One that each IFA should be involved in or at least have a better understanding of. ”

**Alastair Young**  
Avidus Scott Lang & Co Ltd

“ It is clear that this report is a very useful “Bible” on EIS investing. ”



**Lord Howard Flight**  
EIS Association

## Distribution

This report will be downloaded by over **3,000 financial services professionals** and read by over 6,000, carried in the adviser trade press and given air-time at conferences, training events and other speaking engagements. We will also distribute it through our network of over **50 affiliate organisations**, supplying high quality hard copies upon request.

## Industry reports schedule 2016

<b>BPR</b>	Q2 2016	Limited to 8 providers	<b>Participation Invited</b>
<b>AIM</b>	Q3 2016	Limited to 8 providers	<b>Fully subscribed</b>
<b>Structured Products</b>	Q4 2016	Limited to 8 providers	<b>Participation Invited</b>
<b>Smart Beta</b>	Q4 2016	Limited to 8 providers	<b>Participation Invited</b>
<b>EIS</b>	Q4 2016	Limited to 8 providers	<b>Participation Invited</b>
<b>VCT</b>	Q4 2016	Limited to 8 providers	<b>Participation Invited</b>

## Partnership opportunity

Limited to eight providers per report, a **Report Partner Package** of £3,500 + VAT is available on a first come first served basis and includes the following:

- ✓ Input into scope and review of draft
- ✓ Two attributed quotes in the report
- ✓ Personalised landing page
- ✓ Exclusive access to adviser feedback
- ✓ Full page of structured advertorial
- ✓ 100 hard copies of the report
- ✓ Listing within the provider directory
- ✓ First refusal to subsequent reports

# Bespoke Reports

Our bespoke reports offer you specialised third party research to support your portfolio of products.

Building on the success of our award winning Alternative Investment Report (AIR) series, our bespoke reports focus in on specific alternative investment sectors, gathering all of the relevant research and information together in one place and providing advisers with a single, CPD accredited resource on topics that they are less familiar with.

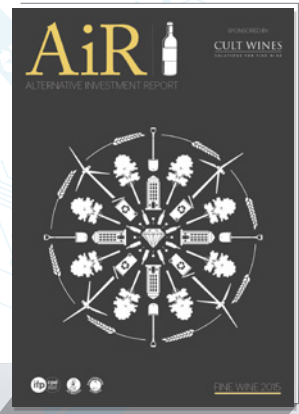
Bespoke reports allow advisers to get an overview of specific alternative investment markets by covering the investment case, the risks they need to be mindful of and the future outlook for the sector, as well as examining the different ways to invest. Typical topics include past performance, liquidity, costs, market trends and the latest industry developments. We look at the pros and cons of the asset class and draw on the latest available research to build a detailed 360 degree picture of the sector for readers.

The reports are not sales literature and are educational, balanced and informative. Advisers tell us they feel more confident making decisions about the suitability of investments once they have absorbed the information in the reports, and sponsors tell us that by using the reports to educate advisers about the sector, when they meet with them they can focus on talking about their investment product.

The reports have high production values and a strong visual appeal. The text is supported with charts, tables and quotes from leading authorities in the sector, making the documents easy to read and great collateral to share with advisers as 'take-aways' from conferences, events and meetings.

We share the reports with our 6,000+ strong audience of advisers and investment professionals and, using the key findings we uncover in our research, support sponsors' PR campaigns, often generating significant coverage in both the trade press and mainstream media.

Flip through our reports! click on them to view



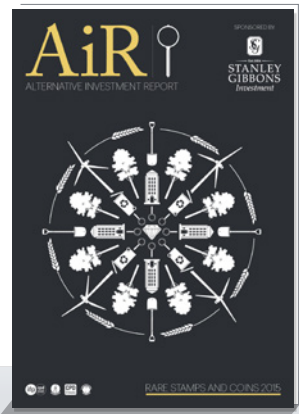
FINE WINE



SHIPPING



PRECISION ENGINEERING



STAMPS & COINS



STUDENT PROPERTY



FORESTRY

[VIEW THE ENTIRE COLLECTION ONLINE](#)

## Why bespoke reports?

Many advisers are keen to understand the whole range of alternative investment options available to them because they want to retain their 'independent' status, be certain of covering the whole-of-market and feel confident that they can source the best possible solutions for their clients.

However, because many alternatives are investing in unquoted companies or unconventional assets advisers often have concerns. These concerns centre on risks, liquidity and their own lack of knowledge. Investment providers spend a considerable amount of their time and effort helping advisers address these concerns.

Intelligent Partnership's bespoke reports reduces the time that providers have to spend overcoming these objections. The reports educate advisers on the topic, filling in the gaps in their knowledge and allowing them to make informed decisions about a particular alternative investment asset class. Providers can then focus their efforts on explaining their investment proposition, without having to make a case for the sector first.



## Enhanced profile:

ENGAGED**INVESTOR**

 find a  
wealth manager.com

**FT** FINANCIAL  
TIMES

FTSE  
GLOBAL MARKETS

 institutional**asset**manager

**II** INTERACTIVE  
INVESTOR

INVESTMENT**EUROPE**

**investors**  
CHRONICLE

 moneyfacts.co.uk

New Model **Adviser**

**Telegraph**

THE ECONOMIC **VOICE**

**Wealth**Briefing

*What* **Investment**  
FOR A WEALTHIER FUTURE

## Participation opportunity



A **Bespoke Report Package** of **£9,000 + VAT** is available and includes:

- ✓ Input into scope and review of draft
- ✓ Five attributed quotes in the report
- ✓ First refusal for subsequent reports
- ✓ Name and company details of all report registrations
- ✓ Branding on cover of the report
- ✓ Personalised report landing page online
- ✓ Exclusive access to adviser feedback

# Tax-efficient Briefing

Weekly aggregated content and data delivered directly to relevant intermediaries in the form of a e-newsletter.

## Why subscribe to Tax-efficient briefing

Intermediaries are very well served in today's digital world, with a whole host of financial trade press vying for their attention. However, pouring through each publication and hunting for the right article is time consuming - and time is money for this group. Advisers across the industry are crying out for investment-specific and curated news content which has been aggregated from the financial trade and mainstream press.

Tax Efficient Briefing meets that need. Distributed weekly, it's an informative e-news bulletin comprising the most up-to-date, tax-efficient investment intelligence from across the financial media, condensed into the most relevant articles for our intermediary community.

This weekly research resource is invaluable to intermediaries. By allowing them to access targeted, suitable and - most importantly - informative news, we are empowering them further, enabling them to keep one step ahead of their peers.



## Why sponsor this weekly briefing?

### **Exclusive brand association**

With just one sponsorship opportunity per week, you can be sure your message will reach our subscriber community loud and clear. The package includes two banner adverts linkable to the sponsor plus a link to one news story.

### **Sponsored content opportunity**

In addition to the exclusive brand sponsor we have some limited availability for additional sponsored content. Sponsors can provide news, video or other useful resources. All are linkable to the source sponsor.

### **Reach over 12,000 intermediaries**

Our subscriber community opt in to receive the sector specific Investment Briefing they are interested in. So you can have complete confidence that you are targeting the most relevant audience at all times. With access to the market leading Matrix intermediary database you can be confident of reaching all intermediaries interested in tax efficient investing. Over 12,000 relevant intermediaries receive the briefing every week.

### **Receive warm prospects from us**

We report back on distribution, open rates and clicks on your branding and content. Additionally, we identify those intermediaries who actively engage with your content, sending you their data so you can send your own messaging direct.

We will deliver you genuine leads by telling you which firms are engaging with tax efficient content, as well as driving traffic to your own site and content.

If you can't read this email, please [click here](#). To ensure you continue viewing emails from Intelligent Partnership, please add [info@intelligent-partnership.com](mailto:info@intelligent-partnership.com)

## Investment briefing

# TAX EFFICIENT

WEEK 12

NEWS ROUNDUP MARKET snapshot READ CONTENT WATCH VIDEOS

Simon Housden on due diligence of EIS  
He warns on about the issues of limited availability of financial professionals (EIS) for investment opportunities and returns that gearing brings, and why investors need to balance fundraising with opportunities.

### News roundup

- HMRC makes start-up investors wait a year for refund
- Advisers missing out on tax-efficient opportunities
- The limits crucial to development of social investing
- Treasury tax plans will 'decimate' UK's community energy projects
- Octopus starts EIS fundraising campaign for Apollo VCT

### Market snapshot

10	43	11	11	29
EIS	SEIS	SITR	BPR	VCT
NEWEST OFFERS:				
<b>SEIS</b>	<b>Stellar Estate Planning Service</b> Stellar Asset Management Ltd	General Enterprise	Cap. Preservation & Income	<a href="#">DOWNLOAD BROCHURE</a> <a href="#">VIEW OFFER</a>
<b>EIS</b>	<b>Puma EIS</b> PUMA Investments	General Enterprise	Cap. Preservation	<a href="#">DOWNLOAD BROCHURE</a> <a href="#">VIEW OFFER</a>
<b>EIS</b>	<b>TIME EIS</b> TIME Investments Ltd	Transport	Growth	<a href="#">DOWNLOAD BROCHURE</a> <a href="#">VIEW OFFER</a>
<b>VCT</b>	<b>Octopus Titan VCT</b> Octopus Investments Ltd	Technology	Growth & Income	<a href="#">DOWNLOAD BROCHURE</a> <a href="#">VIEW OFFER</a>

ACCESS THE FUND PAPER [View all offers](#)

### Stay updated

#### Read

**EIS: Measuring performance**  
The reality of EIS performance measurement

**Smaller companies**  
Why invest in them? Small and medium sized businesses are the backbone of UK economy

**VCT Industry Report 2016**  
The first industry report focused purely on Venture Capital Trust (VCT)

#### Watch

**EIS Masterclass: interview with Keith Robertson**  
Approach to suitability for EIS. Why advisers "turn" third party investment information at their peril?

**Growth Investor Awards: David Gauke Speech**  
Why the Government supports firms investing in smaller businesses and the importance of a healthy and dynamic investment industry that is focused on the area

Simon Housden on due diligence of EIS  
He warns on about the issues of limited availability of financial professionals (EIS) for investment opportunities and returns that gearing brings, and why investors need to balance fundraising with opportunities.

CONTACT US  
Intelligent Partnership  
Holford Chambers, 11 Holford Road, Richmond, TW9 1JH  
If you no longer wish to receive these emails, you can [unsubscribe](#)

intelligent partnership | INDOAGAT

## Premium Sponsor banner (top of page)

Horizontal banner. Linkable to source

## News

Roundup of the week's relevant news from all media sources. Linkable to the source article. Can include sponsor's content.

## Market snapshot

Widget providing tax-efficient market data and intelligence from MICAP.

## Library

Useful written resources, including articles and CPD accredited reports. Can include sponsor content.

## Video channel

Dedicated video content from practitioners and professionals in the industry. Can include sponsor content.

## Second Premium Sponsor banner

Big horizontal banner. Linkable to source

Tax-efficient Briefing is distributed weekly.

## Participation opportunity

The Premium Sponsorship Package includes:

- ✓ Exclusive Advertisement and Branding
- ✓ 1 x Premium Placement Horizontal Banner 570x70px
- ✓ 1 x Large Horizontal Banner 570x140px
- ✓ 1 x News Story
- ✓ Dedicated destination URL(s) for the Banners and Sponsored News Story

## Pricing (per week)

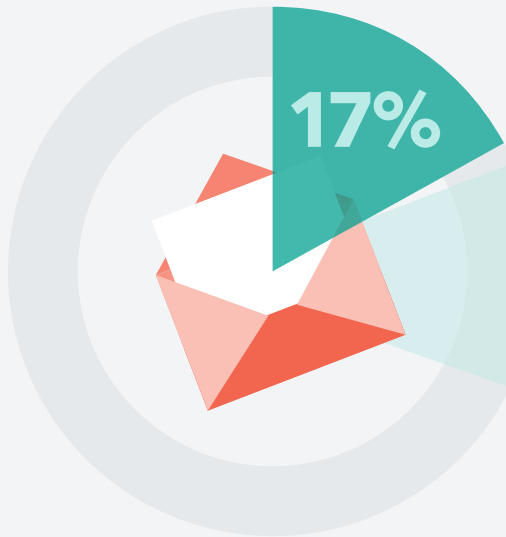
Premium Sponsorship	£2950
News article	£750
Library resource content with link	£475
Video with link	£475



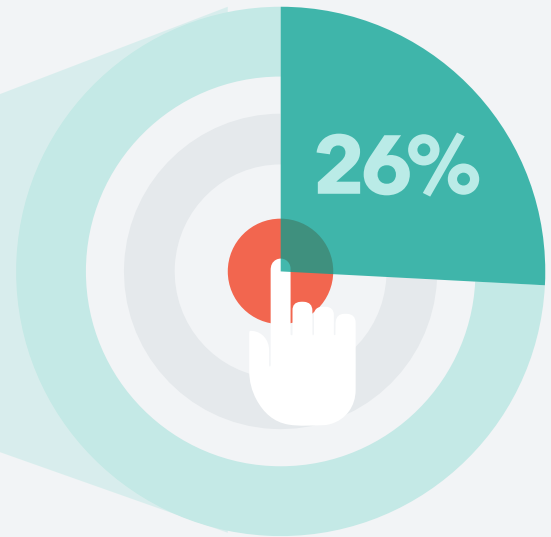
To participate in Tax-efficient Briefing, please contact **Guy Tolhurst**:

phone: 0203 375 1704 | 07977 406 337

email: [guy@intelligent-partnership.com](mailto:guy@intelligent-partnership.com)

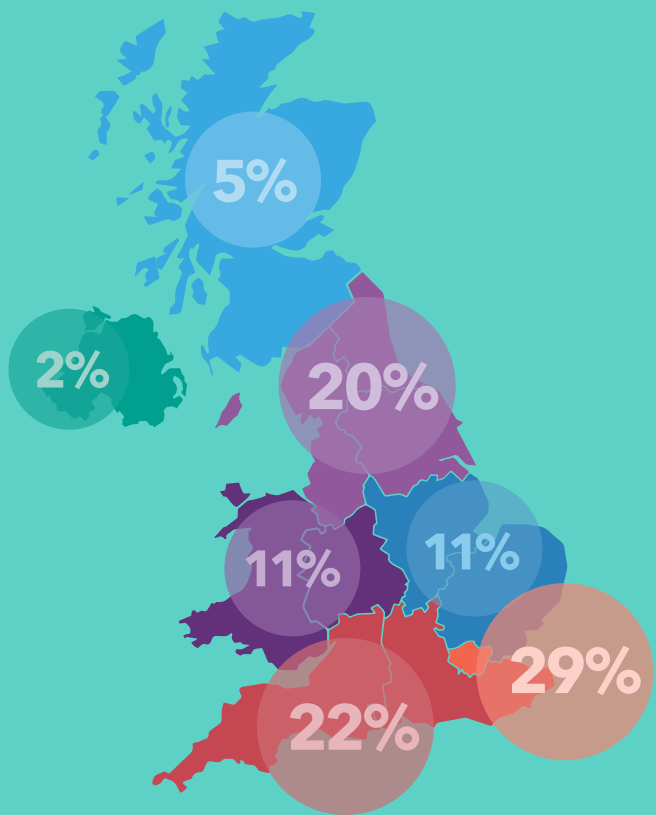


**AVERAGE  
OPEN RATE**



**AVERAGE  
CLICK-THROUGH**

# RECIPIENTS BY REGION



# 3470

## SUPER USERS

VIEW OUR CONTENT WEEK AFTER WEEK



## SPEND LONGER THAN 6 SECONDS



# 14%

OF THE OVERALL CLICKS GO TO SPONSORED CONTENT



# 305 UNIQUE AUDIENCE EACH WEEK



# Events

Our events are the perfect platform for you to build brand awareness and develop your business.

**Each event is designed to educate and provide recognition**

They attract high quality attendees, connecting you with key decision-makers in a thought-leadership environment. As an independent and CPD-accredited education provider, we bring together the most relevant intermediaries that are actively exploring alternative investment opportunities.



We run five types of events, each with a different aim:

## Masterclasses

Provide an opportunity for four partners to present to up to 30 advisers at locations all over the UK. Pre- and post-event PR and marketing enhances your brand positioning and increases awareness amongst our audience.



## Alternative Investment Summit

Our third Alternative Investment Summit will bring together 30 speakers and 250 delegates for a day of education, insight and networking. Various sponsorship and other branding opportunities are available.



## Growth Investor Awards

Our Growth Investor Awards bring together 300 industry leaders to recognise the role of the fund management and advisory community in putting investment to work in growth companies.



## Round Tables

Collaborating proactively and reacting to trends creates new opportunities for product and service development.

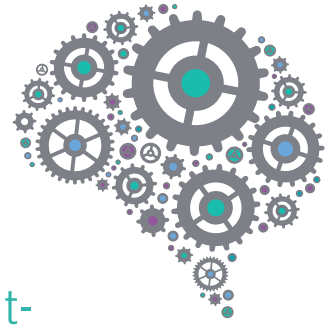


## Showcases

Provide an opportunity for eight managers to present to 50-60 engaged advisers at locations across the UK on their product offerings and network during extended coffee and lunch breaks. Pre-and-post event PR and marketing enhances your brand positioning and increases awareness amongst our audience.



# Masterclasses



Attracting a high quality and quantity of attendees, Masterclasses position our Engage partners as thought-leaders while connecting them directly with intermediaries.

Taking place throughout the UK, these masterclasses give advisers the technical knowledge they need to feel confident recommending alternative investments. Our partners support this by sharing insight and practical guidance on how best to use these investments, the impact of new regulation and how to prepare for any proposed changes. Each masterclass explores a number of perspectives on alternative investment products, providing delegates with a balanced overview of the sector.

## Key statistics

**100%** of attendees would recommend a masterclass to a colleague

**30** delegates from IFAs and Wealth Managers

### ► Watch video highlights:



## Masterclass supporters & partners:

aic

Allenbridge

IBDO

Bloomsbury<sup>®</sup>  
true wealth

Bovill

CISI  
CHARTERED INSTITUTE FOR  
SECURITIES & INVESTMENTCO  
Angel InvestmentCOMPLYPORT  
COMPLIANCE LEADERSHIP

dwf

eisa...  
enterprise investment scheme associationEY  
Building a better  
working worldF  
Finance  
YorkshireICAEW  
CHARTERED  
ACCOUNTANTSLexisNexis<sup>®</sup>MICAP  
ALTERNATIVE INVESTMENT RESEARCHMOORE BLATCH  
solicitors

pwc

PFS

RW Blears  
SolicitorsSIFA  
PROFESSIONAL  
SERVICESSOLLA  
Society of Later  
Life AdvisersST. JAMES'S PLACE  
WEALTH MANAGEMENT

taxbriefs

ten  
THE ENTREPRENEURS  
NETWORK

The Timebank

the wealth care  
PARTNERSHIPTolley<sup>®</sup>

Download programmes from previous events:



EIS



BPR



VCT



# Adviser testimonials on our Masterclasses

“ This was an excellent event. Professional organisation, important subject matter, no padding and high quality speakers giving clear messages on a broad range of alternative investment options. ”



**Brendan Llewellyn**  
Adviser Home

“ The masterclass was a well organised event with some excellent speakers and very useful information. I will be sure to attend more classes in the future. ”



**Jonathan Willis**  
True Potential Wealth Management

“ The tax efficient Investment seminars on EIS, VCT and BPR are well organised and form an excellent introduction to a complex area of client advice. They provide a good overview of products and technical issues, and are a great way to make new contacts. ”



**Ewoud Karelse**  
Towry

“ In an area where it is difficult to get hold of adequate training and technical information, the masterclass provided good technical analysis, access to good fund managers and an overview of due diligence and suitability. I have been looking for support like this and will be subscribing to the Intelligent Partnership service. ”

**Victor Mello**  
Midas Wealth Management

“ Excellent format for the event. Punchy and to the point presentations from the most important providers in the BPR market and experts that understand why this is a vital part of full IHT planning. Not the first Intelligent Partnership event I've been to and hopefully not the last. ”



**Christopher Green**  
St James's Place Wealth Management

“ These workshops are professionally run, with a wide variety of credible presenters who really cover pertinent matters. They are recommended to all practitioners who operate in this area. ”



**Mark Hynes**  
Wealth Strategies

## Masterclass schedule 2016/2017

EIS	London	6th Oct 2016	Limited to 4 providers	Participation invited
EIS	Cardiff	13th Oct 2016	Limited to 4 providers	Participation invited
EIS	Scotland	20th Oct 2016	Limited to 4 providers	Participation invited
EIS	London	Feb 2017	Limited to 4 providers	Participation invited
VCT	London	Jan 2017	Limited to 4 providers	Participation invited
BPR	Bournemouth	12th Jul 2016	Limited to 4 providers	Closed
BPR	London	Jun 2017	Limited to 4 providers	Participation invited
BPR	London	Sept 2017	Limited to 4 providers	Participation invited

## Partnership opportunity

Limited to 4 providers per event, a **Masterclass Partner Package** of £2,500 + VAT per event is available on a first come first served basis and includes the following:

- ✓ Representative speaker presentation (20 minutes)
- ✓ Company/speaker profile and logo in event brochure
- ✓ Video interview with Research Director (edited film supplied within one week of event)\*
- ✓ Promotional and Product literature within the delegate pack
- ✓ Name and company details of all delegates
- ✓ Sponsorship of delegate pack/bag (limited to one sponsor)

\* London event only

# Alternative Investment Summit

An event featuring thought-leadership, high-quality education and unique networking opportunities, the Alternative Investment Summit supports industry collaboration, innovation and growth.

In the midst of intense regulatory focus, intensifying competition, and growing investor demand for more diversified portfolios, the Alternative Investment Summit will explore the opportunities, challenges and risks for financial advisers and wealth managers.

The Summit will bring together product providers, intermediaries and other alternative investment practitioners. Delegates will hear updates and insights on tax efficient investments, alternative finance, real assets, social impact investments and structured products. A day at the Summit will provide attendees with a deeper understanding of the marketplace.



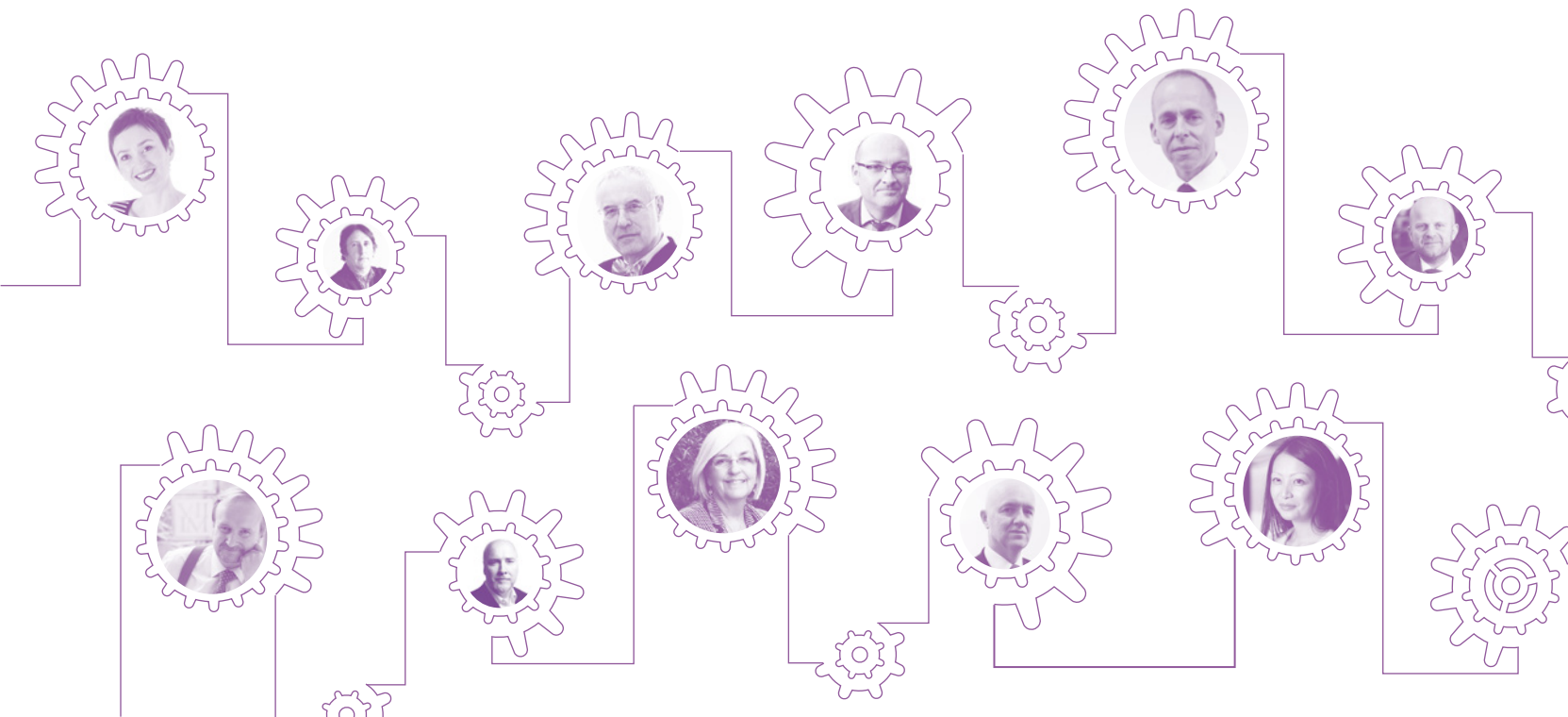
## ► Watch video highlights:



## High-quality speakers and year-round value for delegates – all in one day

Insightful panels and presentations from over 30 expert speakers. Our 2015 event was chaired by David Stevenson – Editor in Chief of AltFinanceNews and regular contributor for titles including The Financial Times, Investors Chronicle, Money Week, Money Management and Investment Week.

This event will build on the success of our 2015 Summit which included an industry overview on ‘the coming of age of alternative investments’ from David Stevenson of AltFi News; panels on topics such as ‘Growing pains in tax efficient investments’, ‘A new dawn for structured products’, ‘where next for social impact investing’; plus keynote speeches from Caroline Mitchell of the Financial Ombudsman Service (FOS).



## Alternative Investment Summit 2016

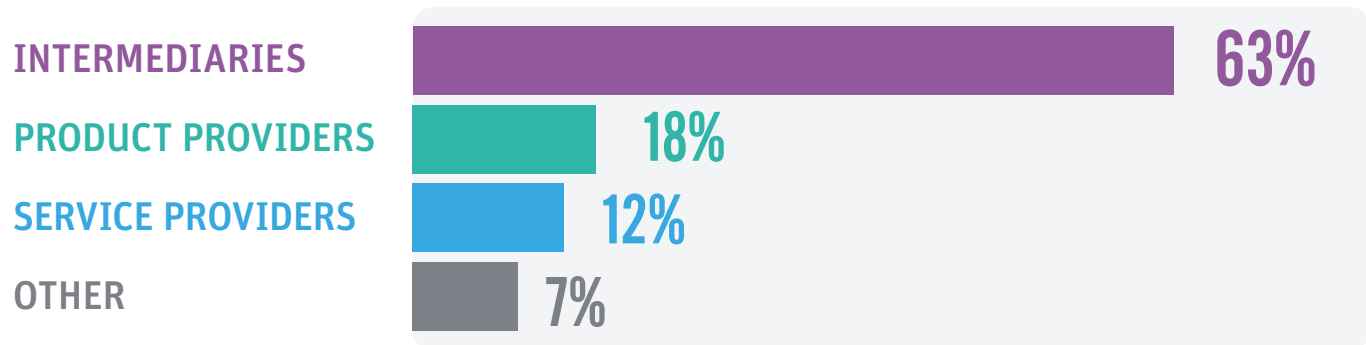
Our previous two Summits attracted over 200 intermediary delegates each for 14 sessions from 26 speakers – earning them 7 hours of structured CPD from the Institute of Financial Planning. It also gave delegates the chance to network with peers, product providers and other alternative investment practitioners while gaining insights into drivers of change from leading industry figures.

Delegates were asked to describe their Summit experience in a few words in a survey. Responses included: “good speakers, informative, relevant”, “thought provoking; intelligent commentary without hype”; and “informative, professional, had gravitas”.

### Other findings included:



### 200+ delegate attendance:



# Adviser testimonials on the AI Summit 2015

“ Very informative, good coverage and a great opportunity to network ”



**Martin Heffernan**  
Thompson Taraz

“ Very informative and excellent range of presenters ”



**John Williams**  
Credit Suisse

“ A good first event and very good networking event ”

**Mark Goodwin**  
Chandler King

“ I found the experience incredibly informative and eye-opening. It provided advanced knowledge in an accessible way ”



**Francesca O'Brien**  
Syndicate Room

“ Very well organised event. I found it extremely informative and felt the panels were exceptional ”

**Jamie Davies**  
Crown WM

“ Informative, professional, had gravitas ”

**Alan Macdonald**  
Realtime Projects

“ Thought provoking, intelligent commentary without the hype ”



**Simon Goldthorpe**  
The Beaufort Group

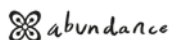
“ Congrats on a great summit – good material, great format and superb production ”



**Andrew Roberts**  
Barnet Waddingham

## Supporters & Partners

The industry has rallied behind our first two AI Summits with support from media and member organisations as well as leading fund managers and service providers.



## Sponsor the Alternative Investment Summit 2016

Sponsoring the Summit is a unique opportunity for partners to increase brand awareness in the run up to a unique industry meeting point.

Our campaign of PR and marketing for the Alternative Investment Summit will ensure you get maximum exposure as a sponsor. Our market intelligence partner Matrix Solutions enables us to reach a total audience of over 30,000 financial advisers and investment professionals.

### Have a look at our latest Summit:

#### ► Watch video highlights



#### ► Download programme



## Sponsorship Opportunities

A **Sponsorship Package** of £3,000 + VAT is limited to 6 partners from the tax-efficient industry and includes the following:

- ✓ Branding and acknowledgement in all AI Summit marketing & promotional collateral
- ✓ Branding, company profile and link on AI Summit website
- ✓ Branding incorporated into signage, AV, and event brochure
- ✓ An exhibition stand/banner in the lunch area
- ✓ Tailored press release announcing sponsorship

# Growth Investor Awards

Celebrating the role of the UK SME fund management community in job and wealth creation, the Awards recognise those enabling start up and 'scale up' businesses to realise their full potential and drive Britain's economic recovery.

Honouring companies and individuals offering value beyond investment, these Awards are primarily aimed at fund managers but also open to any organisation putting investment to work in SMEs including wealth managers, financial advisers and investment platforms.

An independent panel of judges will look for those demonstrating innovation in products and services; impact on investee performance; and ways in which they are championing alternative investment.

#1

## Profile & Recognition

a campaign of PR & Marketing designed around finalists is coordinated with our affiliate partners to raise awareness of the Growth Investor Awards and those shortlisted.

#2

## Guaranteed feedback

every participant receives a detailed Feedback Report with comment from judges highlighting areas for improvement.

#3

## Credibility & Prestige

a two stage judging process will be guided by an Advisory Board of industry leaders, with winners chosen by an independent panel of judges.

## Advisory Board

Our Advisory Board of industry leaders will offer guidance on the judging process. Their insights into those entering will ensure the best in sector are engaged and recognised by the Growth Investor Awards.



### **Sherry Coutu CBE**

Angel investor and entrepreneur  
Non Executive Director,  
London Stock Exchange



### **Luke Johnson**

Chairman,  
Risk Capital Partners



### **Michael Hayman MBE**

Co-founder,  
Seven Hills



### **Simon Devonshire OBE**

Entrepreneur in Residence,  
BIS



### **Emma Jones MBE**

CEO, Enterprise Nation  
and Co-founder, StartUp Britain



### **Tim Hames**

Director General, British  
Venture Capital, Capital &  
Private Equity Association



### **Mike Harris**

Founding CEO,  
First Direct & Egg



### **Claire Cockerton**

Founder, CEO and Chairwoman,  
ENTIQ

## 2016 Awards Categories

- ▼ Industry Champion
- ▼ Exit Of The Year
- ▼ Most Impactful Investment
- ▼ Industry Game-changer
- ▼ Best Investment Platform
- ▼ Best SEIS Investment Manager
- ▼ Best BPR Investment Manager
- ▼ Best AIM Investment Manager
- ▼ Best EIS Investment Manager
- ▼ Best VCT Investment Manager
- ▼ Financial Adviser Of The Year
- ▼ Wealth Manager Of The Year
- ▼ Growth Investor Of The Year
- ▼ Growth Champion Of The Year

## Submit your entry

Any company or individual meeting the criteria can enter the Growth Investor Awards. There is an **entry fee** of £195 + VAT per award category.

## Attend the Awards

Our **Table Package** (£2,995 + VAT) includes:

- \* 10 x invitations to drinks reception
- \* 1 x table of ten
- \* Three course dinner + coffee and petit fours
- \* 5 x bottles of wine
- \* 5 x bottles of water

An Enhanced Package, including advertising in the awards brochure, Priority table position and champagne, is also available.

## National Recognition

Being shortlisted for the Awards enables you to maximise opportunities for brand awareness and differentiation in the context of growth investment, innovation and impact.

A phased, year-long PR and Marketing campaign will maximise awareness of the Growth Investor Awards and build momentum that will continue beyond the awards ceremony. PR content will be published by our media partners, Money Marketing and Fund Strategy. Adaptable press releases will be created for the sponsors of each award category, tailored to **three key stages** of the campaign:



Call for entries



Finalists announced



Winners announced



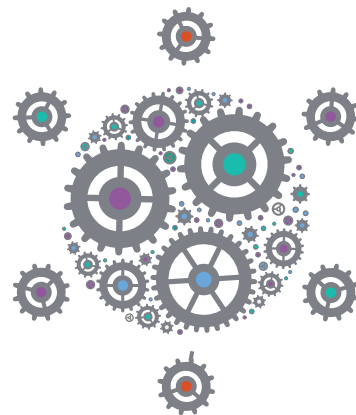
**Growth Investor Awards**

Marriott Grosvenor Square, Mayfair London W1K 6JP

# Round Tables

By participating in our focused round table discussions, thought-leaders can help meet the needs of advisers and help shape the development of the alternative investment industry.

In our effort to create a more efficient and transparent market, Intelligent Partnership works with trade associations, thinktanks, advisers networks and platforms to ensure it is at the forefront of industry developments. These roundtables are a unique opportunity to bring key stakeholders together to debate the innovations driving change and improvement in the sector.



## Round Table schedule

Overcoming the PI Objection	6th September 2016	Participation Invited
Standardising Due Diligence	4th October 2016	Participation Invited
Working with Discount Brokers	30th November 2016	Participation Invited
VCTs on Adviser Platforms	March 2017	Participation Invited
Social Investment Tax Relief	June 2017	Participation Invited

## Participation opportunity

We run these events throughout the year, inviting participation from around the industry to discuss industry developments. A limited number of product providers\* can participate in these roundtables. Participation includes:

- ✓ One representative at the round table discussion
- ✓ Copy of the discussion points from the round table
- ✓ Opportunity to comment in associated press release
- ✓ Contact details for all participants

\*As demand is high, preference will be given to partners in our Engage programme.



If you're interested in participating in our Round Tables, please contact **Guy Tolhurst**:

phone: 0203 375 1704 | 07977 406 337

email: [guy@intelligent-partnership.com](mailto:guy@intelligent-partnership.com)

# Showcases



The Showcase offers a chance to present your tax-efficient investment solutions and services to an audience of engaged advisers, with an opportunity to meet them afterwards.

## The perfect audience

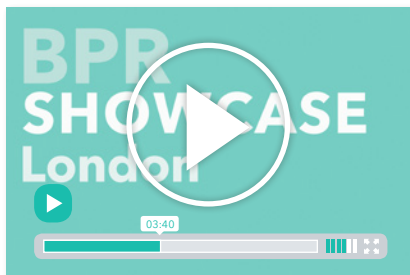
We invite eight Fund Managers to deliver a 3-minute elevator pitch, followed by a 15-minute presentation to advisers and then commit to making themselves available to answer questions during the breaks. We have an exhibition area accessible during the breaks for Fund Managers to display a small pull up banner stand and any other literature and promotional giveaways.

## High quality sessions

We expect circa 50-60 advisers, wealth managers and intermediaries to attend each event.

Attendees will see 8 elevator pitches and 4 Fund Manager presentations in the first session, followed by 40 minutes networking & exhibition time. This is followed by another 4 Fund Manager presentations with Q&A, and a 60-minute networking lunch & exhibition.

## ► Watch video highlights from our latest Showcase:



## No education required

The events are not CPD accredited and the presentations do not need to be educational. However, to help advisers make meaningful comparisons between products, we insist that each presentation covers the same issues that we know from our market research are key concerns for advisers when they are assessing tax-efficient investments:

- \* **DETAILS OF THE INVESTMENT PROVIDER:** ownership, length of time in the market and financial strength.
- \* **INVESTMENT OBJECTIVE OF THE PRODUCT:** growth, capital preservation, income, or a combination of the three, and the targeted level of annual returns.
- \* **DETAILS ON THE PROPOSED UNDERLYING INVESTMENTS:** how will they generate returns and how is liquidity achieved.
- \* **DETAILS OF ALL THE CHARGES:** borne by both the investor and the investees during the product's lifetime. All potential fees should be cover, including performance fees and admin and/or deal fees.
- \* **YOUR TRACK RECORD:** AUM - Performance track record (overall) and performance track record of the product you are discussing today (if you have more than one product)
- \* **DIFFERENTIATION:** What differentiates your product from the others in the market?
- \* **PLANNING IDEAS:** What planning ideas/client situations is your product suitable for?

## Save time, save money

In this way, attendees will be able to review eight offerings on a like-for-like basis and then engage directly with the Manager's adviser facing teams during the breaks. This saves them some of the time and effort they would normally have to put into researching and sourcing tax-efficient products.

The Showcase also saves Managers the time and effort they would spend arranging dozens of initial adviser meetings, knowing full well that many of those meetings will not bear fruit for them.

# Adviser testimonials on our Showcases

“ Gives a broad overview of the BPR market so really good to see lots of managers at a single time rather than having to carry out a number of one to one meetings. ”

**Stuart Gibbs**  
Prydis Wealth Limited

“ What a great and succinct way to meaningfully compare providers and get an understanding of what they do, how they do it and what they charge for doing so. ”



**Graham Tiffin**  
Clairville York

“ Excellent method to compare and contrast practically the whole of market, providing information to make an informed choice of BPR service provider. ”



**Richard Armitage**  
Partners Wealth Management

“ There is little enough education on this highly technical area of the market, so when you have a chance to learn from and speak to 8 different providers at the same event, on the same day why wouldn't you attend? A well-structured, informative and well run conference, which was an excellent use of my time. ”



**Gareth Tregidon**  
Stafford House Investments

“ Like a website comparison site for BPR providers but in the flesh. ”



**Julian Hanrahan**  
Crowe Clark Whitehill

“ A very well run event giving exposure to a large number of top providers in the BPR sector. Well worth attending if you are looking to research providers or increase knowledge in this area. ”



**Ian Paginton**  
Fraser Wealth

## Showcase schedule 2016/2017

EIS	Cheshire	5th October 2016	VCT	Bristol	26th January 2017
EIS	Bristol	12th October 2016	BPR	Birmingham	15th September 2016
EIS	London	19th October 2016	BPR	London	21st September 2016
EIS	London	February 2017	BPR	Brighton	22nd September 2016
EIS	Cheshire	February 2017	BPR	London	16th May 2017
EIS	Bristol	February 2017	BPR	Bristol	18th May 2017
EIS	Yorkshire	February 2017	BPR	Dorset	23rd May 2017
VCT	Cheshire	19th January 2017	BPR	Brighton	25th May 2017
VCT	London	24th January 2017	BPR	London	27th April 2017

Participation in a Showcase event is limited to 8 providers

## Partnership opportunity

Limited to 8 providers per event, a **Showcase Partner Package** of £3,000 + VAT per event is available on a first come first served basis and includes the following:

- ✓ Representative speaker presentation (1 x 3 minute elevator pitch & 1 x 15 minute in-depth presentation per event)
- ✓ Dedicated and branded area for meetings and networking
- ✓ Company logo and speaker profile in marketing collateral
- ✓ Product literature in the delegate folders
- ✓ Name and company details of all delegates
- ✓ MICAP data sheet on each relevant product offer for all delegates

# Video content

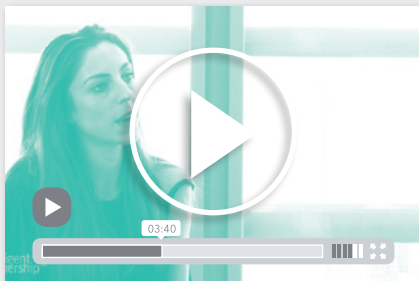
*Engage* video content enables you to tell a more compelling story about your company, current offers, management team, investment philosophy and portfolio companies.

Video is the most engaging marketing tool available – more intermediaries are using video to consume information than ever before. It's persuasive, memorable and search engine-friendly. To date, we have produced over 50 videos on alternative investments – a combination of interview, talking heads and educational content.

## Why video works

- ✓ 80% of people are more likely to take action after watching a video
- ✓ Video builds trust and credibility much more effectively than static content
- ✓ Increase click-through rates by 200-300% in your email marketing
- ✓ Video on a webpage is 53x more likely to appear on the first page of Google

## ► Watch video highlights:



## Collaborate with us to create video content

- \* **SAVE TIME AND MONEY** by sharing the cost of a studio, video production and editing
- \* **HUMANISE YOUR COMPANY** through our structured video narrative
- \* **CREDIBILITY** – interviews conducted by an independent third party are perceived as more credible
- \* **EXPOSURE** – videos will be hosted on our Research Hub, Vimeo and your website to maximise exposure
- \* **PRESS** – videos will also be placed in the financial trade press and marketed to our affiliate network

## Participation opportunity

Opportunities to collaborate on video content are available throughout the year. They are included within structured activity such as our Masterclass and Showcase events or can be tailored to your individual objectives and timelines.

[VIEW THE ENTIRE VIDEO COLLECTION ONLINE](#)



intelligent.  
partnership\*

## INTERACT WITH US:



[intelligent-partnership.com](http://intelligent-partnership.com)



For more information or to participate in any of our initiatives, please contact **Guy Tolhurst:**

phone: 0203 375 1704 | 07977 406 337

email: [guy@intelligent-partnership.com](mailto:guy@intelligent-partnership.com)