



EIS
MASTERCLASS

05.03.2015

Intelligent Partnership is the UK's leading provider of education and insights on alternative investments.

We deliver accredited research, training and events to a community of financial services and investment professionals. IFAs and Wealth Managers make up the majority of our 3,500 subscribers, all of whom are interested or active in alternative investments.

Our aim is to increase awareness and engagement amongst intermediaries, providing them with the tools and information they need to speak knowledgeably with their clients about the whole investment universe.

Our content is delivered using digital and printed reports, via video and through live events - these are accredited for Continuing Professional Development (CPD) by the Chartered Insurance Institute (CII), Institute of Financial Planning (IFP) and Personal Finance Society (PFS).

We are building a future where alternative investments are as understandable and accessible as mainstream assets; if we can do that we will create a much more open and efficient market for everyone.

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Accreditation



Hello and thanks for attending our **EIS masterclass**, kindly supported by **Tolley**, the **EISA**, industry experts and thought leaders from four **EIS fund managers**.

In today's climate, advisers need to be experts in EIS investment opportunities.

Whether it is to mitigate income tax bills, defer a CGT liability, to work alongside an existing pension arrangement, or as part of estate planning, the benefits that come with EIS are unique in addressing such a wide range of clients' most pressing concerns. Research shows that these are the areas where clients feel their advisers add the most value.

This masterclass is designed to help you acquire the technical knowledge you need to be an expert. You will earn 3 hours of structured CPD; hear the latest views on how EIS are going to interact with the new pension freedoms; learn how to avoid common misconceptions and pitfalls; and take away practical tips on how to use EIS with your clients.

Today's event is aimed at advisers who are already active in EIS, or who are planning on taking the EISA diploma. The intention is to avoid the usual product pitches and give you insight and practical knowledge from some of the EIS industry's most insightful thought leaders.

The masterclass will cover tax planning and how to maximise the benefits for suitable clients, key compliance issues such as client segmentation, panel selection and keeping a good advice audit trail. We will also take a look at some investment topics, including appropriate levels of diversification and what's next for that perennial EIS favourite, renewable energy.

Advisers will leave the event feeling safe in the knowledge that they are up to date with the latest developments in the sector and confident that they will be able to comply with the rules when they recommend EIS. Most importantly, attendees will be equipped to deliver a service that is hugely valued by their clients.

Thanks for taking the time to attend this educational initiative and I hope to have a chance to speak with you personally at some point.

Enjoy your morning!

LexisNexis
Lexis House
30 Farringdon Street
London
EC4A 4HH

Thursday 5th March 2015
08.45 - 14.00

intelligent-partnership.com/events

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**intelligent.
partnership** *

Guy Tolhurst
Managing Director
Intelligent Partnership

FORMAT OF THE DAY

As with most things we do at Intelligent Partnership it's our intention to meet the needs of **IFAs and Wealth Managers**.

We've been really encouraged by the level of interest in our EIS industry report, as it shows that the advisory community is demanding higher quality and more in depth research and education in this area.

While our annual reports help to raise awareness and increase engagement in tax-efficient investments, our masterclass events have an altogether different purpose.

The intention with these half-day events is to provide advisers with technical knowledge in a structured, CPD accredited learning environment.

The masterclass format allows us to bring in industry experts to deliver in-depth educational presentations, share best practice and promote high levels of competency.

We hope that attendees at these event acquire additional skills, understanding and awareness of developments in the alternative investment marketplace. Our masterclasses are not an opportunity for providers to make yet another sales pitch - they are about generating insights and building confidence.

Our aim is to help advisers position themselves as experts in the eyes of their clients.

We know that there are plenty of other training events and seminars that can take you away from the office. We feel that our approach of focusing on education and thought leadership offers IFAs and Wealth Managers a way to stay on top of some of the more complex areas of investment, and feeling able to recommend alternatives to their clients secure in the knowledge that they are among the most up to date practitioners in the profession.

THE EIS

The EIS is a rare **Win-Win-Win** scenario, where the incentive does exactly what it was intended to do with few side effects - and the investors, the investee companies AND the treasury all benefit.

#1 Small businesses are the lifeblood of the economy. They account for more than 90% of businesses, 60% of employment and 50% of turnover in the private sector - and yet they are starved of the capital they need to grow. Net bank lending fell by £3bn in 2014, leaving a funding gap of £167bn.

The Enterprise Investment Scheme is helping to address this: £1.02bn was raised in the 2011/12 tax year (the last year we have confirmed statistics for), and it is estimated that over £1.5bn was raised in 2012/13. In total, over 20,000 businesses have raised £11bn since the scheme was introduced. It is important that this source of capital continues to flow into our SME's if the UK economy is going to continue to recover from the recession.

In addition, the EIS investment managers provide guidance and support to their investee businesses.

So win number one for the EIS is that it is providing financial backing and technical support for a vital part of the UK's economy.

#2 EIS also addresses a number of important financial planning needs: particularly for the baby boomer generation which control 80% of private wealth in the UK and form the backbone of many advisers' client banks. Some of the things to consider about this group include:

- If they are still working and at the height of their earning power - EIS investments can help offset their last few large income tax bills and provide some high growth for the last few years of accumulation.
- If they are retired and in the decumulation phase - EIS investments can help to defer any capital gains tax bills that are incurred.
- If they are thinking further ahead to passing on their wealth to the next generation - EIS investments mean they can stay invested and be 100% IHT exempt.

So win number two for the EIS is that it helps to meet some of the financial planning needs of the biggest and wealthiest demographic in our society.

#3 Finally, it has been estimated that even though the EIS has some of the most generous tax reliefs on offer in our system, it is actually a net benefit to the treasury. As the investee companies grow, they and their employees pay more in corporation tax, VAT, income tax and NI contributions, more than offsetting the initial tax expenditure.

Win number three is that the EIS may well be self-financing.

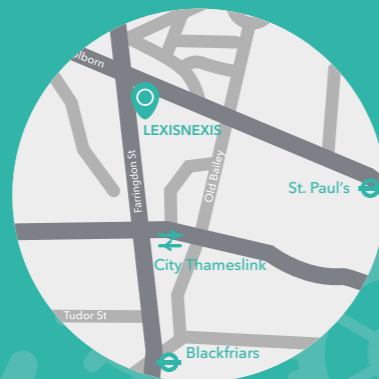
In summary

EIS is an asset class whose time has come - it is uniquely able to meet several financial planning needs in one stroke, it is an important help to small businesses and it is one tax relief that should not come under the spotlight for tax avoidance.

THE VENUE



Entrance via Farringdon Street



EC4A 4HH



Classroom

08.45

08.45 Registration

09.15 Opening Remarks

Dan will kick us off by setting the scene and letting you know important housekeeping details such as how to submit questions and how to claim your CPD.

Dan Kiernan
Intelligent Partnership



09.20 Why EIS investing is a "socially useful activity"

A positive start to the morning and some broader context for the sessions to come. In 2009 Lord Turner, chairman of the FSA, said that the City was too big and parts of it were "socially useless". Sarah has very kindly agreed to come this morning and set out some of the reasons why EIS is a direct contrast to this perception of investment and in fact a positive boon for the real economy.

Sarah Wadham
EISA



09.30 Tax planning using EIS

Tony begins the technical sessions by looking beyond the tax reliefs available with EIS and outlining some advanced strategies to maximise their benefit in different scenarios. Most advisers will be aware of the five major reliefs that are available via an EIS investment, but Tony will show us a handful of examples of how they work in practice that may well provoke some new insights into when and how EIS can be used.

Tony Mudd
St James's Place



09.50 Diversification Vs conviction: why you should take a portfolio approach

Matt walks us through how a portfolio approach maximises loss relief and reduces risk, using the latest research on the outcomes of angel investing. Everyone understands the concept of diversification, but what is a sufficient level of diversification in this particular investment universe and how can advisers achieve that level of diversification for their clients? And is there an investment case for the opposite approach? Matt takes a look at the evidence.

Matt Taylor
Rockpool Investments



10.10 Panel games - how to put the perfect panel together for your business

Putting a panel of EIS investments together is a sensible shortcut for advisers who want to be independent and whole-of-market, but can't afford to spend time and resource researching the entire sector every time they recommend EIS. Odi will outline how to put together a panel in a way that will serve you and your clients, and keep your compliance team happy.

Odi Lahav
Allenbridge IS



10.30 Where to draw the line on client suitability

The tax benefits of EIS cannot be looked at in isolation - they have to be considered alongside the risks of the underlying investment assets, and for this reason EIS will only be suitable for certain segment of clients. Eddie will discuss if and when the tax benefits can ever outweigh the investment risks and exactly how to identify suitable clients within your client bank.

Eddie Grant
Ingenious Investments



10.50 Questions panel

Tony, Matt, Odi and Eddie will be on a panel to answer your pre-submitted questions.

11.00

11.05 Coffee break

Coffee, tea, refreshments and networking.

11.25 Getting qualified - the EISA diploma

Chris will give a short overview of the EISA diploma - the topics covered, the learning resources, the examination process and most importantly how it benefits the advisers who study it.

Chris Siddle
Tolley



11.35 It's all about timing: why EIS doesn't have to be seasonal and planning exits for income

Andrew will give us an in-depth presentation on two topics related to timing: how timing investment into exit focused EIS can be used to build up an income at a later date; and how the window of opportunity for claiming the tax benefits can be utilised - meaning that we don't really need an EIS "season" at all.

Andrew Sherlock
Oxford Capital



11.55 Client files - what does good look like?

As an alternative investment into higher risk assets with tax planning implications, capturing the whole advice and investment process in the client file is crucially important. Gillian talks us through exactly what needs to be included to ensure your advice audit trail is robust and how to ensure you have compliant client files.

Gillian Roche-Saunders
Bovill



12.15 The end of renewables?

Renewable energy has been a perennial favorite EIS investment, in no small part due to government investment incentives such as Feed-in Tariffs and Renewable Obligation Certificates. With these incentives excluded from EIS now, does renewable energy still stack up as an investment? Henny examines the case for and against, and looks at some other potentially attractive sectors.

Henny Dovland
Time Investments



12.35 Questions panel

Andrew, Gillian and Henny will be on a panel to answer your pre-submitted questions.

12.50 Closing Comments

Dan will sum up and bring the morning to a close before we break for lunch and networking opportunities.

Dan Kiernan
Intelligent Partnership



13.00 Lunch

Buffet lunch, refreshments and networking.

14.00



THANK YOU TO ALL OUR SPEAKERS FOR PARTICIPATING IN THIS EDUCATIONAL INITIATIVE.

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The EIS masterclass is a fantastic opportunity to learn from some of the **leading practitioners** in the EIS industry.

We feel our speaker panel is a good representation of the **depth** and **diversity** of expertise that is available to advisers in this sector.



Daniel Kiernan
INTELLIGENT PARTNERSHIP

Dan Kiernan researches, writes about, talks about and trains on alternative investments, helping advisers and investors navigate the market.

Dan has been with **Intelligent Partnership** since 2010, having previously been at BNY Mellon working with large institutional clients to help them understand the performance of their investments.

At Intelligent Partnership Dan is the research director, heading up a team that produces and delivers accredited research, reports and training on alternative investments for a broad mix of financial services and investment firms.



Sarah Wadham
EISA

Sarah has worked for over ten years in the **Business Angel** space and has helped several companies, mainly in software and technology, raise finance from Business Angels and EIS Funds.

She was previously a technology analyst and broker with Dominick and Dominick, a New York brokerage firm.

Sarah is Director General of the **EIS Association**. Sarah is also the founder of Aphrodite Angels, a network of high level professionals who offer a range of services to help people going through transformation and major life changes.



Tony Mudd
ST JAMES'S PLACE

Tony has spent over 21 years at **St James's Place** within the Business Development division in a wide variety of roles.

Having run the Tax and Trusts Division for a number of years, with principal responsibility for estate planning, trustee investments and the development of products and services, he now has primary responsibility for Protection, Small Business Market, Tax Advantage Investments and Long Term Care. He remains the **senior technician** within St James's Place Wealth Management and regularly contributes articles in both the industry and national press.



Matt Taylor
ROCKPOOL INVESTMENTS

Matt is the Managing Partner of **Rockpool Investments**, which he founded in 2011. With a mission to make investing in unquoted companies as easy as the stockmarket, Rockpool has already brought together clients with investable wealth of over £2 billion.

Matt has been investing in unquoted companies for over 20 years, starting with private equity investor 3i, during its time as the dominant player in the UK. For the last 14 years, he has focused on creating tax-efficient routes into private company investing for individuals. He **created the EIS Guide** and is a frequent commentator on technical aspects of EIS investing.



Odi Lahav
ALLENBRIDGE IS

Odi is the CEO of **Allenbridge Investment Solutions**, a leading institutional investment advisory firm, providing independent advice, due diligence and analytical solutions to investors.

Allenbridge advises institutions with assets exceeding £44bn, including: pension plans, charities, family endowments and banks. Odi is also responsible for the strategic management of the Allenbridge's tax research business. Odi also acts as an investment advisers to several family offices. He is an Actuary by training, and has held several roles covering investment management, risk and governance. Prior to forming Allenbridge, he was Head of the Alternative Investment Group at Moody's Investors Service in London.



Edward Grant
INGENIOUS INVESTMENTS

Edward is an Investment Director in the Client Relationship Team with **Ingenious Investments**, responsible for a team developing relationships with investors and their advisers.

A Chartered Financial Planner and a Fellow of the Personal Finance Society, He has built a reputation as a technical specialist and was the first candidate nationally to pass the recently launched Enterprise Investment Association Diploma in 2014.

As a past President and board member of the Personal Finance Society, Edward is a **passionate advocate** of the financial planning profession and during his extensive career spanning over 20 years he has sought to support, mentor and lead the development of initiatives to build consumer confidence and trust in financial advice.

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Chris Siddle

TOLLEY

Chris Siddle joined the **Exam Training** team in 2012 to teach on a range of tax exam courses including ATT, CTA and the ICAS Tax Qualification. Chris joined Tolley from Kaplan where he was head of the Newcastle centre for a number of years before becoming National Head of Tax Courses.

Chris started his career with Deloitte where he qualified as a chartered accountant and then progressed to do his CTA exams where he was a Stanley Spofforth Medal winner.

Chris is a **well known personality in the tax world**, particularly in the North-East, where he has taught tax on a wide range of exam courses and CPD events.



Gillian Roche-Saunders

BOVILL

Gillian's focus is supporting firms that arrange early-stage and growth finance to companies. She heads up the **Bovill Venture Finance** team and manages their relationships with EIS and venture capital fund managers as well as crowdfunding platforms and corporate finance advisors.

Gillian's experience includes evaluating new products, reviewing financial promotions, delivering training and providing advice on everything from client money to financial crime requirements. She has led a number of complex authorisation applications to the FCA and assists firms to manage their compliance burden once regulated.



Henny Dovland

TIME INVESTMENTS

Henny Dovland joined **TIME Investments** in January 2014, having previously been at Octopus Investments for five and half years.

She has been working in the tax efficient investment space for nearly seven years and has a particular focus on legislation based tax planning incorporating Enterprise Investment Schemes and Inheritance Tax Planning through the use of Business Relief qualifying investments. Henny has during the last seven years worked exclusively with financial advisers, wealth managers and private banks to allow planners to add value to their client bank and their professional connections.



Andrew Sherlock

OXFORD CAPITAL

Andrew is a Partner of **Oxford Capital**. He has over **15 years of experience** in smaller companies with Cazenove, Dresdner Kleinwort and Goldman Sachs.

Previously Andrew qualified as a chartered accountant with PriceWaterhouseCoopers and subsequently worked for a number of years in industry with Mars in Russia and Procter & Gamble in the UK.

LEARNING OBJECTIVES

This event has been designed to provide assisted learning for the **Tolley EIS Diploma** as well as providing delegates with **structured CPD**, a requirement of which is the meeting of specific learning objectives.

We have defined **six primary learning objectives** for this half day masterclass. Achieving these will equip delegates with relevant practical knowledge of EIS, supporting them in their study for some of the more technical chapters in the EIS diploma.

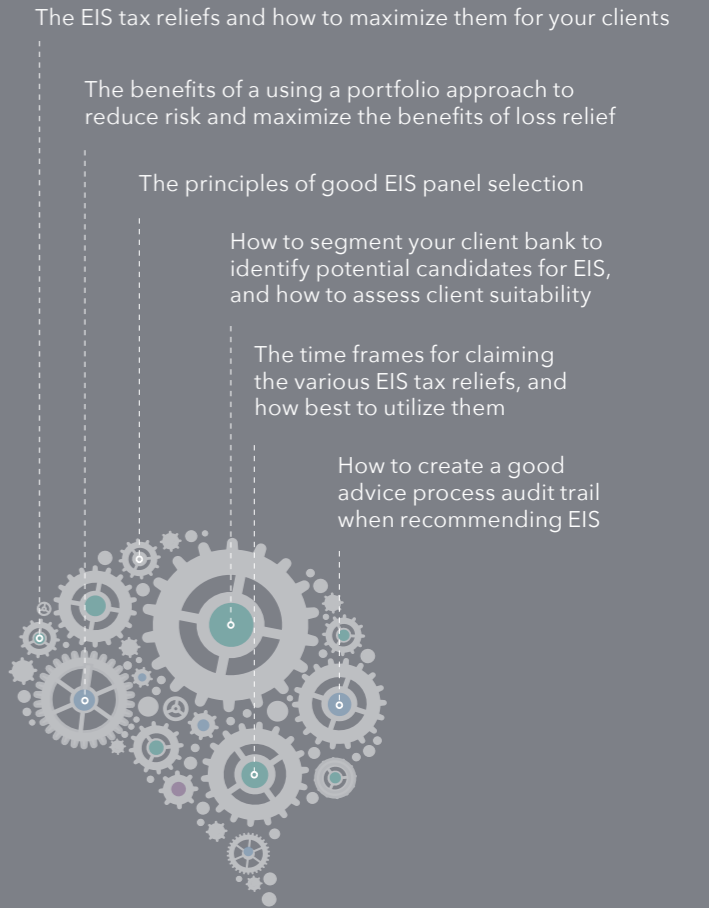
The masterclass will act as assisted learning for these chapters within the Tolley EIS diploma:

CHAPTER 3 Tax Reliefs:

- Income Tax relief when subscribing for shares under the EIS
- CGT relief for investing in EIS
- IHT relief for shares in EIS

CHAPTER 4 EIS Funds:

- Analysing and comparing EIS funds and providers
- How to benefit from the tax reliefs
- The tax reliefs and benefits of EIS investing
- Types of suitable investors



THANK YOU TO ALL OUR SPONSORS, PARTNERS AND SUPPORTERS FOR MAKING THIS EVENT HAPPEN.

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Tolley Exam Training is one of the UK's leading providers of CTA, ATT, ADIT, ITP and Online Diploma training.

Through a combination of highly experienced tutors, quality training material and unique online services, Tolley Exam Training offers the best study experience available, achieving pass rates that significantly surpass the national average.



Mary Rodgers
020 7620 6789
mary.rodgers@eisa.org.uk
www.eisa.org.uk

The EIS Association ("EISA") is an independent, not-for-profit organisation, the aim of which is to assist in the flow of capital and resource available to UK small to medium-sized enterprises (SMEs) through the Enterprise Investment Scheme - the EIS and its junior cousin the Seed EIS (SEIS).

The EISA, its founder members and board have been involved with the EIS since inception. The organisation dates back to 1990, originally as the BES Association and has an established history of dealing with tax effective investments in small to medium sized companies across various economic cycles. The EISA performs a number of key functions, its aims being twofold: 1. To work with HM Treasury, HM Revenue & Customs, Government Ministers, MPs, the FCA, BIS (Department for Business, Innovation & Skills) and other interested parties to improve the success of the EIS/SEIS; 2. To promote the benefits of the Schemes across the board including investors, EIS/SEIS companies and their advisers.

Any party involved in EIS/SEIS Schemes should be a member of the EISA.



Tony Müdd
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St. James's Place Wealth Management is a leading UK wealth management organisation. Founded in 1991, St. James's Place was listed on the London Stock Exchange in 1997 and is now a FTSE 100 company with over £52 billion funds under management.

The company provides face-to-face advice to clients based on their individual needs and circumstances, adapting the advice as requirements change over time to ensure that recommendations remain appropriate.



Simon Housden
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TIME provides tax efficient investment solutions and we're proud to say we're rather good at it - our original Inheritance Tax service boasts an impressive 19 year track record of successfully achieving Inheritance Tax savings for our investors.

What stands us apart in our market is our focus on seeking consistent stable returns which we deliver through a defensive investment strategy. We pride ourselves on offering real transparency around our products, what we invest in and what the risks are. We're dedicated to supporting the adviser market and we recognise that our services require professional advice, which is why we don't accept direct investments.

We also have a nationwide sales team on hand to assist financial advisers in identifying solutions for their clients' financial concerns, dealing with technical queries and delivering one-to-one support.

INGENIOUS INVESTMENTS

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Ingenious has built up an enviable track record of success over our 17 year history. We have raised and deployed over £9 billion, £710 million of which was into EIS qualifying companies.

Aside from our size and scale, what separates us from the marketplace is the longevity of our track record and to date, over 105 Ingenious EIS companies have gone through the minimum three year hold period and shareholders in the each of the companies have achieved a successful exit.

We have a clear strategy of making intelligent investments, achieving steady growth and retaining value for the EIS investor. We specialise in three key sectors: Media, Clean Energy and Real Estate. We pride ourselves on our deep industry knowledge and have a track record of delivering innovative and efficiently structured investment opportunities.

OXFORD CAPITAL

Andrew Sherlock
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Oxford Capital aims to make EIS investments accessible, easy to understand and hassle-free for investors and their financial advisers.

The firm has two distinct EIS strategies - Investment in high growth companies from a range of industries and investment in companies which own infrastructure assets.

The Oxford Capital Growth EIS portfolio backs established businesses to support their expansion. Oxford Capital builds each investor a portfolio of around 8-10 companies, providing the tax advantages of the EIS whilst mitigating some of the risk of smaller company investments through diversification.

The Oxford Capital Infrastructure EIS invests in companies which own and operate infrastructure assets, such as renewable energy installations, earning revenues through long-term contracts. Because the investments are asset-backed, the Infrastructure EIS has a lower risk profile than some other EIS investments.

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Matt Taylor
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Rockpool creates private company investment opportunities for its Network of successful entrepreneurs and professionals. Deals created for the Network are also open to a wider audience of investors through Rockpool's EIS Portfolio Service. This Network Investment model offers unrivalled transparency and flexibility for investors.

Rockpool targets companies which are profitable or have significant asset backing. The Rockpool Network includes hundreds of successful entrepreneurs with experience in a wide range of business sectors. This gives us access to hidden opportunities, acts as an anchor for our decision making and enables us to contribute more to the success of the private companies we support. In the last 3 years, nearly 1,000 investors have committed £100 million to 25 companies through Rockpool.

Compliance is our thing. We don't do anything else. We're totally focused on financial services regulation.

Since we first rolled up our sleeves in 1999 we've been helping businesses in financial services to thrive. We've built a team of professionals with the right experience and know-how to deal with regulation so you can focus on your business goals.

You can come to us whether you're long established and going strong, or on your way there. And we'll give you peace of mind whichever part of the industry you're in. We love sharing our expertise, using it to fix things for our clients and coming up with the answers to new challenges.

You won't get superficial advice from us, or a long report full of facts and figures you don't need. We cut to the chase and give you practical and commercially savvy ways to make things work. That's why people come back to us - and tell other people about us.

And because we're doing what we do best, you can get on with what you do best.



Customer Services
020 8989 8464
customer.serv@cii.co.uk
www.cii.co.uk

As the leading professional body for the global financial services profession, the Chartered Insurance Institute (CII) exists to promote higher standards of integrity, technical competence and business capability. With over 115,000 members in more than 150 countries, the CII is the world's largest professional body dedicated to insurance and financial services.

Our membership covers all disciplines within the insurance industry (claims, broking, underwriting and sales), those working in the life and pensions sector, the mortgage advice market and financial advisers (under the Personal Finance Society brand).

As one of the largest examination awarding bodies in the UK, we have delivered education to over one million students in 150 countries over the last 10 years. Success in CII qualifications is universally recognised as a global standard. While membership of the CII signals a commitment to developing a broad professional capability and to a willingness to adhere to the standards associated with professional status.

Allenbridge has been analysing and advising on tax-efficient products since 1985. Along with Allenbridge Investment Solutions, the Allenbridge group of companies advises on over £40 billion of investments and specialises in due diligence of complex investments.

We offer a full range of independent in-depth reviews and advisory services across VCTs, EISs/SEISs, and BPR/IHT products. We also produce a subscription-based research publication called the Allenbridge Tax Shelter Report, used by hundreds of subscribers across the country. The service covers the majority of the products available in the market, including regular fund updates and new entrants, to ensure that we can offer the widest market viewpoint possible.

The cornerstone of our research is our due diligence methodology and scoring system, developed over many years of market experience. Our team have diverse backgrounds, including tax, legal, accounting and actuarial expertise and have a wealth of experience performing due diligence on private investments and tax shelter products. All of our research and due diligence goes through our thorough governance process, under the oversight of our Investment Committee and compliance officer.



Membership Team
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The Institute of Financial Planning (IFP) is a membership and training body focused on supporting Financial Planners and Paraplanners with their personal and development goals as well as helping them to engage with a community of professionals. We're also one of the FCA's accredited bodies authorised to issue statements of professional standing.

IFP members benefit from an extensive programme of branch meetings, training courses, seminars, events and networking opportunities both face to face and online. We help members learn more about the benefits of comprehensive Financial Planning, to structure effective and profitable businesses, gain appropriate CPD and work towards achieving appropriate qualifications such as the CERTIFIED FINANCIAL PLANNERSM certification.

94% of IFP members agreed that their membership helped to develop their Financial Planning skills, 71% say it's increased their job satisfaction and 65% reported improved client satisfaction (member survey 2013). Please get in touch if you'd like to find out more.







We'd love to hear your thoughts...

How would you rate each of the following?

	Poor	Good	Very Good	Excellent
Venue	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Location	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Format of the morning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content and topics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Number of speakers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Timing (month of the year)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

How would you rate the masterclass **speakers** for content and presentation, where 1 is poor and 5 is excellent?

Speaker	Content (1-5)	Presentation (1-5)
Daniel Kiernan <i>Intelligent Partnership</i>	<input type="text"/>	<input type="text"/>
Sarah Wadham <i>EISA</i>	<input type="text"/>	<input type="text"/>
Tony Mudd <i>St James's Place</i>	<input type="text"/>	<input type="text"/>
Matt Taylor <i>Rockpool Investments</i>	<input type="text"/>	<input type="text"/>
Odi Lahav <i>AllenbridgeIS</i>	<input type="text"/>	<input type="text"/>
Edward Grant <i>Ingenious Investments</i>	<input type="text"/>	<input type="text"/>
Chris Siddle <i>Tolley</i>	<input type="text"/>	<input type="text"/>
Andrew Sherlock <i>Oxford Capital</i>	<input type="text"/>	<input type="text"/>
Gillian Roche-Saunders <i>Bovill</i>	<input type="text"/>	<input type="text"/>
Henny Dovland <i>TIME Investments</i>	<input type="text"/>	<input type="text"/>

Please provide us with any recommendations or improvements we can make to the masterclass?

.....

.....

.....

Are you likely to recommend our masterclass events to a colleague or fellow professional?

Yes No

Would you be interested in more research and education on tax-efficient investments? (Please tick all that apply)

- BPR Masterclass
- BPR Industry Report
- VCT Masterclass
- VCT Industry Report

Which other alternative investment sectors are you interested in? (Please tick all that apply)

- Real Assets
- Alternative Finance
- Social Impact Investments

Are you happy to participate in our surveys to help create a more transparent and efficient market?

Yes No

If you have enjoyed this event can we contact you by email afterwards to obtain a short testimonial?

Yes No



Tolley® Exam Training Enrolment Form

The content of the EIS Masterclass is designed to act as assisted learning for core elements of the Tolley EIS diploma. Attendees of this masterclass that register for the diploma will benefit from our specially negotiated group discount of 40%.

1. Order Details

- Please enrol me on the EIS Diploma course at the special discount rate of £190 (including VAT)
(includes £50 registration fee, examination fee and EISA accreditation)

2. Delivery Details

- Material to be sent to Home address
 Work address

Please note that the course material will be sent to you by courier and will need to be signed upon delivery.

Postage: please note that delivery of material within England, Scotland and Wales is free of charge. We reserve the right to charge additional costs of delivery outside of these areas.

Student Details

Full name _____
Home Address _____
Postcode _____
Phone _____
Email _____

Employer Details

Full name _____
Home Address _____
Postcode _____
Phone _____
Email _____

3. Your Payment Choice

- Please debit me my personal credit /debit
** To comply with the Payment Card Industry Data Security Standard (PCI-DSS), LexisNexis does not accept payment card details by email, fax or post. An authorised member of staff will contact you by telephone to arrange payment.*
- Cheque payable to LexisNexis for £ _____
- Please invoice my company

4. Order Authorisation

Signed ±~ _____
Print name _____
Date _____

We accept responsibility for the payment of fees due and have read and understood all the terms and conditions found on www.tolley.co.uk/extraining_t&c

±~ I consent to Tolley® Exam Training processing, recording and retaining my Personal Data including sensitive personal data relating to my training and, if my employer is paying for my course, I further consent to Tolley exam Training releasing all or part of such to my employer.

Please return this enrolment form to Intelligent Partnership who will pass it to Tolley Exam Training.

For more information
please call 020 3364 4500,
email examtraining@lexisnexis.co.uk
or visit www.tolley.co.uk/EISDiploma

eisa
enterprise investment scheme association



"The IFP is pleased to confirm its accreditation of this EIS Masterclass. 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, Institute of Financial Planning

"Intelligent Partnership's masterclass programme brings together industry thought leaders to deliver technical knowledge and practical guidance for advisers. Intelligent Partnership's events meet the standards we expect for 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, Chartered Insurance Institute

Intelligent Partnership actively welcome thoughts and comments to help shape the development of this event. If you would like to provide feedback, please visit our website or email:

intelligent-partnership.com/events
events@intelligent-partnership.com

Intelligent Partnership has achieved CPD accredited status for its education programmes on Alternative Investments from both the Chartered Insurance Institute (CII) and Institute of Financial Planning (IFP).

This EIS masterclass has been accredited by the IFP and CII, meaning its members and other financial services professionals can obtain 3 hours of structured CPD for attending the event. To claim your structured CPD certificate for this half day masterclass please visit:

www.intelligent-partnership.com/cpd

Achieving the recognised industry standard afforded by the CII and IFP for our reports, training and events demonstrates our commitment to delivering balanced, technical and informative content to each of you.

We hope that today is just the start and that you will enjoy more of our content and education programmes. We love producing them, and we love to hear feedback - do get in touch any time to let us know what you think and tell us about any areas you'd like us to cover.





You're on the road to mastery...

Engage in more of our education programmes so you can speak confidently and knowledgeably about the whole investment universe.

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