



VCT
MASTERCLASS

26.06.2015

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.

Sponsors



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Accreditation



Hello and thanks for attending our **VCT masterclass**, kindly supported by **DWF**, industry experts and thought leaders from our **VCT** providers

In today's climate, advisers need to be experts in VCT investment opportunities. VCTs have been around for twenty years now, but with new limits on how much can be saved into pensions they are more relevant than ever. There are very few other investments that can provide tax free gains and income along with the liquidity that comes with a stockmarket listing. However, nobody should be under any illusions that these are not high risk investments, so advisers must have confidence that their compliance and due diligence processes are watertight to ensure that good products end up with suitable clients.

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 VCTs 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 VCTs with your clients.

Today's event is aimed at advisers who are already active in VCTs and the intention is to avoid the usual product pitches and give you insight and practical knowledge from some of the VCT industry's most insightful thought leaders. The masterclass will cover:

- How to research and select a VCT: what to look for - liquidity, buy back policy, investment process, track record, size, charges and more
- What types of clients are suitable for VCTs: various planning scenarios
- How VCTs can complement pension planning: especially following the most recent pension changes
- What's under the bonnet of a VCT: types of VCT, types of investee companies, how are fund objectives achieved?
- How to recommend a VCT and get it through your compliance team

We hope 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 the rules when they recommend VCTs. 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 all of you personally at some point. Enjoy your morning!

DWF
20 Fenchurch Street
London
EC3M 3AG

Friday 26th June 2015
08.45 - 14.00

intelligent-partnership.com/events

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**intelligent.
partnership** *

Guy Tolhurst
Managing Director
Intelligent Partnership

WHO SHOULD ATTEND

As with most things we do at Intelligent Partnership we want to attract the attention of **IFAs** and **Wealth Managers**.

We've been really encouraged by the level of interest in both our EIS and BPR industry reports, as it shows that the advisory community is demanding higher quality and more in depth research and education in this area. We will be publishing a VCT report in the Autumn.

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 events 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: but we feel that our approach of focusing on education and thought leadership offers advisory firms 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 VENUE



20 Fenchurch Street



EC3M 3AG



Classroom

VENTURE CAPITAL TRUSTS

Broadly speaking, a VCT is a company whose shares trade on the London stock market and it aims to make money by investing in very small companies which are looking for funding to help develop their business. This is a vital area of the economy - it is estimated that small and medium sized enterprises provide 95% of employment in the UK and up to 50% of private sector turnover - and without funding from venture schemes such as VCT and EIS many companies would never be able to grow their businesses.

To encourage investment in this crucial area, the government offers generous tax benefits to investors, including tax relief of up to 30% when investing.

A VCT typically invests in around 20 such businesses. These are chosen by the VCT manager - an expert in identifying opportunities amongst fledgling companies, and negotiating attractive deals for investors. VCT managers have different specialties and manage their funds to different objectives. Common VCT categorisations are AIM focused, Generalist, Specialist and Limited Life. If a VCT is right for an investor, there is a lot of choice.

Profits are paid to VCT investors as tax-free dividends, which means they can complement traditional pensions. The VCT manager will also provide expertise to help their chosen firms expand and provide better returns for their investors. They normally look to sell their share of the business three to seven years after investing and reinvest the capital in the next opportunity.

VCTs can be an exciting investment proposition, but they are also higher risk as smaller companies can be prone to failure. VCT shares are difficult to buy and sell - the market price may not reflect the value of the underlying investments. The value of the shares will fluctuate, income is not guaranteed and investors could get back less than they invest.

VCTs are therefore aimed at wealthier, sophisticated investors who can afford to take a long-term view. For advisers, they represent a significant opportunity to add value for their clients, but they come with additional compliance and due diligence requirements over and above what is required for more mainstream investments.

08.45

08.45 Registration

09.00 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



09.05 VCTs - Putting Investment Capital to Work

Ian will put VCTs into their broader context by discussing the wider social and economic benefits of investing in VCTs, as well as touching upon the investment case for advisers.

Ian Sayers
AIC



09.20 The VCT Outlook

With a more aggressive anti-avoidance stance from HMRC, European State Aid rules under review, changes brought about in the recent budget, a new government installed and another budget in the pipeline, Chris will give us PwC's view on the political outlook for the VCT regime.

Chris Moakes
PwC



09.35 The VCT Landscape: Generalist/Specialist VCTs

VCTs come in several different flavours, each with their own unique considerations. In this presentation Diana will walk us through the nuts and bolts of AIM, generalist and specialist VCTs, giving us insights into how they are managed and the risks and benefits of all three varieties.

Diana French
Octopus



09.55 VCT Regulatory Requirements

Will is going to discuss the regulatory requirements that VCTs have to meet and how they are intended to protect investors, as well as giving advisers tips on what to look out for in an investment prospectus.

Will Bateman
DWF



10.15 It's not just about the tax!

Of course VCTs are a special brand of investment company, and the closed investment company structure has some benefits over the more common open-ended investment company. Chris is going to talk us through these, with reference to VCTs.

Chris Hutchinson
Unicorn



10.35 Questions Panel

Ian, Chris, Diana, Will and Chris will be on a panel to answer your pre-submitted questions.

10.55

10.55 Coffee Break

Coffee, tea, refreshments and networking.

11.10 VCT Products: Sourcing, Selecting and Due Dilligence

Graham is going to give us the inside track on the key areas to look at and the key questions advisers should be asking of providers when sourcing VCT products and carrying out due diligence.

Graham Robertson
Triple Point



11.25 The VCT landscape: Limited Life VCTs

The last category of VCT, and perhaps the least well understood, are limited life VCTs. Eliot is going to give us the lowdown on them, how they are run, their risks and benefits and where they might find a place in an adviser's proposition.

Eliot Kaye
PUMA Investments



11.45 VCTs and Suitability Reports

Damian is going to talk us through the issues involved in putting together accurate suitability reports, debunking some of the myths and helping us understand exactly what advisers' suitability obligations really are.

Damian Davies
The Timebank



12.05 Using VCT Investments in the Current Environment

And finally Tony will wrap up the day with some genuine VCT client case studies.

Tony Müdd
St James's Place



12.25 Questions Panel

Graham, Eliot, Damian and Tony will be on a panel to answer your pre-submitted questions.

12.45 Closing Remarks

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 VCT masterclass is a fantastic opportunity to learn from some of the **leading practitioners** in the VCT 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, presents 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.



Ian Sayers
AIC

Ian joined the Board of the AIC when he became Chief Executive in 2010. He had previously been the AIC's Technical Director from 1998 until his promotion to Deputy Director General in 2005, and prior to that he was a tax manager. He had previously been a tax manager at Ernst & Young, specialising in investment trusts. Ian is a member of the Institute of Chartered Accountants in England and Wales and the Chartered Institute of Taxation.



Chris Moakes
PwC

Chris works as part of the Venture Capital tax team at PwC and manages relationships with EIS and venture capital fund managers as well as early-stage companies looking to understand the complicated tax legislation in this area.

Chris's experience includes assisting VCTs to monitor their portfolios against the qualifying conditions, working with clients to secure advance assurances on investments and advising on transactions to ensure VCT / EIS qualifying status is maintained.



Will Bateman
DWF LLP

Will has advised VCTs raising funds from retail investors since 2010 and has been fortunate enough to have worked with almost all of the top ten VCT fund managers.

Will has been with top 20 UK law firm DWF LLP since 2014, having previously been at Howard Kennedy where he worked as both lawyer and sponsor on VCT mergers, IPOs and secondary fundraisings totalling in excess of £500,000,000. Will's advisory experience extends to the structuring of new tax efficient products, including the first ever Seed EIS fund, reviewing and approving financial promotions and dealing with complex compliance questions raised by investment firms.



Diana French
OCTOPUS

Diana is a Business Development Manager at Octopus, working with firms in the South West. Alongside this, she is a product specialist within Octopus' VCT Team, which includes helping with industry insight, product launches, developing seminar material and planning fundraises. Diana has a BSc in Economics from the University of Warwick.



Chris Hutchinson
UNICORN

Chris is the lead manager of Unicorn AIM VCT and has been a member of the Unicorn Investment Committee since he joined the firm in 2005. Prior to joining Unicorn, Chris was a Fund Manager at Montanaro Investment Managers for over eight years where he specialised in UK smaller companies.

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Graham Robertson

TRIPLE POINT

Graham joined Triple Point in 2007 and manages relationships with the intermediary market. He has over 30 years experience in sales and marketing roles with leading London based asset management businesses.

He is a member of the Chartered Institute for Securities and Investment, the Personal Finance Society and the Chartered Insurance Institute.



Eliot Kaye

PUMA INVESTMENTS

Eliot Kaye joined Shore Capital in 2006 following seven years at leading city law firm Berwin Leighton Paisner LLP where he advised on a substantial number of M&A and private equity deals, and was short-listed as a nominee for the Associate of the Year Award at the Legal Week Awards. Eliot has been involved in the management of all of the Puma VCTs. Eliot is a member of the VCT Committee of the Association of Investment Companies, has represented the industry to HM Treasury and HMRC and is a regular writer and speaker on tax efficient investing.



Damian Davies

THE TIMEBANK

Damian has been a Paraplanner for 15 years, so even before it became fashionable! In that time, he has gone on to found one of the most established Paraplanning businesses in the country. As you can imagine, he lives, eats and breaths suitability so the rest of us don't have to!



Tony Müdd

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.

LEARNING OBJECTIVES

Today's event provides delegates with three hours of **structured CPD**, built around achieving the following learning objectives:

What to look out for in a VCT investment prospectus

How to carry out due diligence on VCTs

Segmenting your client bank and identifying suitable clients for VCT investment

How to satisfy the compliance requirements when recommending VCTs

The different ways in which Generalist, AIM, Specialist and Limited Life VCTs are managed according to their objectives



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



Will Bateman
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DWF is a business law firm with a distinctive approach. We are attentive listeners and problem solvers, and we always tell it like it is - providing useful, practical advice that cuts through to the results you need.

We want to deliver the best legal service for all our clients. We work hard at it. Everything we do is based on developing a thorough understanding of your needs and what you value. We want to exceed your expectations. We grow with you and your business, as changes arise. We collaborate and communicate.

We know that when you are choosing your legal experts, quality, commerciality, value for money and consistency are some of the most important things. That is why we take time to talk to you, to make sure that you have access to the right client partner, lawyers and resources to suit your needs and ways of working.



Graham Robertson
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At Triple Point our investment philosophy is simple; we target opportunities which offer our investors:

- Capital Security
- Liquidity
- Transparent Exit Strategies

This approach is designed to create value for our investors and deliver sustainable growth for the businesses which we fund.

Our experience and expertise enables us to unlock unique opportunities for our investors. To deliver these we match the requirements of private investors seeking capital security, liquidity and a clear exit strategy with the needs of carefully vetted small and medium sized companies seeking funding.

Typically, we select opportunities which fund tangible assets, or help organisations to deliver the essential services they provide to their customers. We select high return investments from across a range of sectors which has included technology, renewable energy, and asset finance.



Chris Hutchinson
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www.unicornam.com

Unicorn Asset Management was established in 2000 and is an independently owned and managed company. It specialises in investing in UK small and mid-cap companies, AIM and fledgling markets.

Unicorn operates a team based approach to investment management and its experienced, committed and well-resourced investment team has almost 100 years' of combined experience. Unicorn is focused on being the 'best not the biggest' and its funds aim to deliver long term outperformance. Unlike many investment firms, Unicorn is majority owned by its directors and managers, providing further incentive to help ensure that the funds deliver consistently strong performance.

Unicorn currently manages £861 million (30/04/2015) across a range of funds designed to satisfy a variety of investor requirements, including UK Income, UK Growth, UK Smaller Companies, an investment trust and an AIM focused VCT.



Ian Sayers
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The Association of Investment Companies (AIC) is the trade body for the closed-ended fund industry, including investment trusts, VCTs and offshore investment companies. The organisation runs an education and training programme for finance professionals, helping to increase levels of understanding and knowledge of investment companies. This includes online training as well as face-to-face seminars, participation in industry conferences and bespoke training for individual firms. The AIC also works with the media and opinion-formers to engage investors and financial advisers, as well as lobbying on behalf of its members to develop the best possible tax and legal environment for them and their shareholders.

The AIC's website, www.theaic.co.uk, contains up-to-date information and data on investment companies, as well as news, opinion and tax and regulatory updates. A special section of the site for financial advisers carries training materials and details of upcoming events, while a monthly newsletter, Spotlight, keeps advisers informed of important new developments in the closed-ended industry.



PUMA INVESTMENTS

Eliot Kaye
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Puma Investments is a subsidiary of Shore Capital Group Limited, an AIM listed company with a 30 year history. Shore Capital has a network of five offices including London, Liverpool and Edinburgh. One of its divisions is a leading market-maker on AIM and an advisor to a large number of AIM listed companies. The asset management division of Shore Capital, which incorporates Puma Investments, manages approximately £800m. Puma investments specialises in VCTs, Inheritance Tax Services and EIS. Puma has raised over £225m in tax efficient investments.

Since the launch of its first VCT in 2005, Puma has adopted a proven asset-backed investment strategy primarily investing in established businesses in the form of ordinary equity offered together with senior-secured loans. Puma's principal focus is on capital preservation, generating stable returns for investors whilst seeking to offer robust downside protection by identifying businesses and opportunities with substantial asset-backing, including in the form of real estate, stock and contracted receivables.



Christopher Moakes
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PwC's venture capital tax team comprises tax practitioners dedicated to advising Venture Capital Trusts, EIS funds, SMEs, early-stage growth companies, and business owners on the tax issues impacting them.

As well as expertise on venture capital tax reliefs, the team has a broad range of skills advising on corporate and shareholder taxes, transactions, management incentives, financing and innovation incentives such as R&D, Patent Box and Creative Sector reliefs.

We have a national network of EIS and SEIS specialists and a group of specialist advisors who focus on VCT, IHT and BPR qualifying funds. We also have access to PwC's wider tax and international network and work closely with PwC's Fast Growth Companies team which brings a range of expertise to early stage businesses, including: corporate finance, consulting and assurance related service offerings.

The legislation governing venture capital tax reliefs can be very complex, and our firm has been advising in this area since the inception of the schemes in the 1990s.



Diana French
0800 316 2298
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With more than £5 billion in assets under management, and over 50,000 investors, Octopus is one of the UK's fastest-growing fund management companies. We create investment solutions that combine expertise in smaller company investing with government-approved tax reliefs.

But we don't just focus on developing innovative products and solving client problems. For financial advisers, a relationship with Octopus means:

- Invitations to attend roadshows, seminars and online webinars that qualify for structured CPD.
- Thought leadership and innovation, such as our 2014 High Growth Small Business Report and our Thinking Differently about Retirement Planning brochure.
- Client-friendly literature designed to educate and inform.

We're very grateful for the support of advisers who recommend our products. We're keen for financial advisers to talk to us about anything that they might want help with, and we have more than 60 dedicated staff working across our business development and client relations teams.



Damian Davies
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The Timebank is the most established outsource Paraplanning service, providing bespoke Paraplanning support to hundreds of advisers across the country.



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.



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. Membership of the CII signals a commitment to developing a broad professional capability and a willingness to adhere to the standards associated with professional status.



Customer Services
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The Personal Finance Society (PFS) is the professional body for the financial advisory profession in the UK. We promote the highest standards of professionalism for technical knowledge, client service and ethical practice across the entire financial advice community for the ultimate benefit of the profession and consumer alike, engendering confidence and trust in our profession.

Our mission is to lead the financial advice community towards higher levels of professionalism. This is exhibited through ethical and behavioural standards, interpersonal and business skills and technical knowledge. We support you, our members, with achieving this goal through a wide programme of activities, including advocacy, guidance, publications and related tools, training and educational events.

With over 34,000 members of which over 4000 are Chartered, The Personal Finance Society represents the highest standards of professionalism within the profession.



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 PLANNER^{CM} 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.



YOUR FEEDBACK

We'd love to hear your thoughts...

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)

EIS Masterclass BPR Masterclass
 EIS Industry Report BPR Industry Report

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

Real Assets
 Alternative Finance
 Social Impact Investments
 Structured Products

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

Name:

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"/>
Ian Sayers <i>AIC</i>	<input type="text"/>	<input type="text"/>
Chris Moakes <i>PwC</i>	<input type="text"/>	<input type="text"/>
Diana French <i>Octopus</i>	<input type="text"/>	<input type="text"/>
Will Bateman <i>DWF</i>	<input type="text"/>	<input type="text"/>
Chris Hutchinson <i>Unicorn</i>	<input type="text"/>	<input type="text"/>
Graham Robertson <i>Triple Point</i>	<input type="text"/>	<input type="text"/>
Eliot Kaye <i>PUMA Investments</i>	<input type="text"/>	<input type="text"/>
Damian Davies <i>The Timebank</i>	<input type="text"/>	<input type="text"/>
Tony Müdd <i>St James's Place</i>	<input type="text"/>	<input type="text"/>



“The IFP is pleased to confirm its accreditation of this VCT 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), the Institute of Financial Planning (IFP) and the Personal Finance Society (PFS).

This VCT 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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intelligent.
partnership *

Intelligent Partnership

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