



**EIS**  
**MASTERCLASS**

**FEB 2016**

## 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 5,000 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), Chartered Institute for Securities & Investment (CISI) 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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eisa  
enterprise investment scheme association



### Accreditation



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

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 investments 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 investments 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 your clients, preparing suitability reports and the regulations that govern the scheme - especially in the light of the changes announced in the Budgets this year. We'll also take a look at investment topics such as due diligence, portfolio construction and performance measurement. Finally we'll wrap up with a look at some of the practical considerations to bear in mind when including EIS in your investment proposition.

We hope you will leave the event safe in the knowledge that you are up to date with the latest developments in the sector and confident that you will be able to comply with the rules when you recommend EIS investments. Most importantly, you will be equipped to deliver a service that is hugely valued by your 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!

### #EISMasterclass

LONDON  
10<sup>th</sup> February 2016

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

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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 levels of interest in our EIS industry report and previous masterclass events, 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 VENUE



20 Fenchurch Street



EC3M 3AG



Classroom

# 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: provisional estimates indicate that £1.4bn was raised in the 2013/14 tax year and £1.02bn was raised in 2012/13. In total, almost 22,900 firms have raised £12.2bn since the scheme was introduced. It is important that this source of capital continues to flow into our small businesses to fuel growth and job creation.

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.

# 08.30

## 08.30 Registration



## 09.00 Opening Comments

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 Small Company Investing

A positive start for the morning and some broader context for the sessions to come. We'll cover the importance of small businesses to the economy, growth and job creation and how the EIS scheme helps to address the funding gap.

Philip Salter  
The Entrepreneurs Network



## 09.20 Tax Planning using EIS

We'll begin the technical sessions by outlining some EIS client case studies and strategies to maximise the reliefs that are available - for CGT, Income Tax, IHT, how to utilise the "carryback" and how the EIS can be used for tax-efficient decumulation in the light of the new pension freedoms.

Matt Taylor  
Rockpool



## 09.45 Suitability

Suitability reports can be a big burden for advisers, especially when it comes to tax-efficient investments that have a dual purpose - growth and tax mitigation. In this session we'll cover what does and doesn't need to be included, what the specific considerations are when recommending EIS investments and how to make sure this important task can be done efficiently, without taking advisers away from client facing work for too long.

Damian Davies  
Timebank



## 10.10 Due Diligence

In this session we look at the areas advisers need to explore when conducting due diligence on EIS opportunities. We'll cover what to ask of the investment providers themselves, and what aspects of the specific product need attention. There's more ground to cover conducting due diligence on EIS than on a conventional investment, but nothing to be overly concerned about once you know what to look for.

Henny Dovland  
TIME Investments



## 10.35 Questions Panel



The previous speakers will participate in a panel to answer questions from the audience.

## 10.45 Coffee Break



Coffee, tea, refreshments and networking.

# 11.00

## 11.05 Sourcing and Selecting

In this presentation we look at the whole investment process with a focus on the investee companies. We're considering how managers go out and source deals, build a pipeline, carry out their due diligence on potential investee companies, put the deal together, support the firm as an investor and eventually decide when and how to exit. This is the underlying process that is at the heart of many successful EIS funds, but it can sometimes be a bit opaque or appear to be a bit of a dark art, so we want to bring it out into the open for you.

Robert Davis &  
Madeleine Ingram  
Calculus Capital



## 11.30 Concentration or Diversification

The conventional benefits of diversification are well understood, but when they are combined with the loss relief available via EIS, returns can be maximised. We'll take a look at how that works and what sufficient levels of diversification might be, with some worked examples and reference to the research available on the outcomes from investing in small companies.

Simon Ruthers  
Oxford Capital



## 11.55 Changing Regulations

The government wants to ensure that the EIS scheme encourages growth, represents value for money for the taxpayer and complies with EU State Aid rules. All three of these objectives inform the regulations which govern the scheme and there have been some significant changes in the last twelve months. This session details what the rules are trying to achieve, what has changed and what the likely impact of those changes will be.

Andrew Melville  
EY



## 12.20 Fees, Performance and Alignment of Incentives

Investing in small companies and ensuring compliance with the rules that govern EIS requires specialist skills and knowledge. Deals can take a long time to put together, EIS managers often have an advisory role or sit on the boards of their investee companies and eventual exits have to be negotiated. All of this means that EIS funds charge higher fees than their mainstream counterparts - but how much is too much and what should advisers be looking for when they assess fees and incentives?

Andy Marris  
MICAP



## 12.45 Questions Panel



The previous speakers will participate in a panel to answer questions from the audience.

## 12.50 Closing Comments

Summing up before bringing the morning to a close and breaking for lunch and networking opportunities.

## 13.00 Lunch



Buffet lunch, refreshments and networking.

# 14.00

# Schedule

# 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.



**Philip Salter**  
THE ENTREPRENEURS NETWORK

Philip started his career as Programmes Director at the Adam Smith Institute, running the Institute's events, student activities and researching and representing the Institute on education policy in the media. After three years with the Adam Smith Institute he moved into journalism, becoming Business Features Editor of City A.M., after which he was Editor across EMEA for one of world's largest insurance brokers. While at City A.M. Philip wrote a weekly column on entrepreneurship and interviewed some of Britain's leading entrepreneurs. He now writes a regular column for Forbes on entrepreneurship and blogs at the Adam Smith Institute.



**Matt Taylor**  
ROCKPOOL

Matt is the Managing Partner of Rockpool Investments LLP, which he founded in 2011. With a mission to make investing in private companies as easy as the stock market, Rockpool has already brought together clients with investable wealth of over £1 billion. Matt has been investing in private companies for over 20 years. For more than half that time, he has focused on creating tax-efficient routes into this sector for individual investors. His early career was spent as a private equity investor at 3i, during its time as the dominant player in the UK.



**Damian Davies**  
THE TIMEBANK

Damian started The Timebank in 2003 because it was clear to him advisers simply weren't able to spend enough time on what matters most - clients. Since then he has built and refined what they do constantly as the independent advice sector has changed and evolved.

Having only ever operated in the independent sector, he likes to think he understands the demands of financial planners better than most.

Time has flown by, and now he spends most of his time helping advisers get the most out of their relationship with The Timebank by managing their resources to make sure their clients reach their business goals.

Damian believes the best bit of running The Timebank is seeing advisers getting more time to work on their businesses rather than just in them. The worst bit - dealing with providers who still don't get it!



**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.



**Robert Davis**  
CALCULUS CAPITAL

Robert joined Calculus Capital in 2014 with responsibility for working with the portfolio companies in helping to build value and, importantly, guiding them towards a successful exit.

Robert has over 25 years' advisory experience with a particular expertise in M&A. Most recently he was Head of the European business of Avendus Capital, an Indian investment bank, and previously was the Head of European M&A at Nomura International for eight years. He has also held positions at JP Morgan and Robert / Jardine Fleming.

Robert qualified as a Chartered Accountant with Price Waterhouse and holds an MA from the University of Cambridge.

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**Madeleine Ingram**  
CALCULUS CAPITAL

Madeleine joined Calculus in 2013 and looks after Marketing and Investor Relations. Prior to joining Calculus Capital, she worked for S&P Capital IQ where she was responsible for investment management, investment banking, private equity and algorithmic trading marketing and communications for the EMEA markets. She has managed all elements of the marketing mix, both offline and online. Before joining the marketing team she was a private equity analyst at Capital IQ.



**Andrew Melville**  
EY.

Andrew is a Senior Manager in the Financial Services Risk Management Advisory Practice focusing on regulation within the Wealth and Asset Management sector. He joined EY in 2015 from Northern Trust, where he was a Senior Vice President in Product Solutions. He holds a BComm from the University of Alberta in Canada and is a Chartered Accountant.



**Simon Ruthers**  
OXFORD CAPITAL

Simon works with private clients and their advisers to access Oxford Capital's investment programmes. He brings considerable experience of investment structure, tax and wealth management strategies. With over 15 years experience of the wealth management sector, Simon started his career with Rothschild Asset Management in Guernsey and most recently work for St. James's Place Wealth Management. Simon graduated from Bournemouth University with a BA (Hons) in Financial Services and is an Associate of the Personal Finance Society.



**Andrew Marris**  
MICAP

Andrew has a long career in financial services, business creation and business management. Andrew has worked in financial services for nearly 20 years, firstly as a private client adviser and latterly as a stockbroker with Prudential Bache, before making a successful career in inter-bank equity derivatives sales for over a decade. Latterly, Andrew co-founded and built the highly successful carbon and sustainability consulting practice, dcarbon8 Ltd, selling to Deloitte in 2010. During this time he also co-founded a sustainability certification business, Planet Positive, now trading as Planet First, after which he worked as a business consultant in a number of industry sectors before reverting to the financial services industry. He has since consulted on the creation and launch of the EIS platform, Kuber Ventures LLP and the marketing of EIS schemes to the advisory community. Andrew graduated with a first class honours degree in Structural & Civil Engineering from the University of Bath and has an MSc and post graduate diploma from the Imperial College London.

# 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

The EIS tax reliefs and how to maximize them for your clients

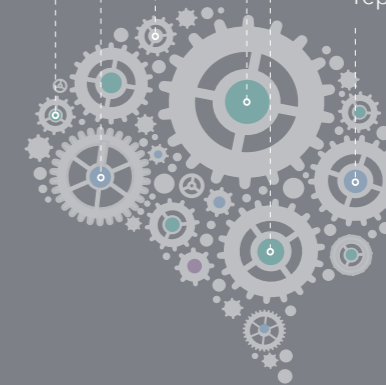
The benefits of using a portfolio approach to reduce risk and maximise the benefits of loss relief

How to research and assess EIS schemes, and set up an investment panel

How to segment your client bank to identify potential candidates for EIS, and how to assess client suitability

The regulations that govern EIS and how they have changed in the last twelve months

How to write compliant and understandable suitability reports when recommending EIS



# THANK YOU TO ALL OUR SPONSORS, PARTNERS AND SUPPORTERS FOR MAKING THESE EVENTS HAPPEN.



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Calculus Capital is first and foremost a Private Equity Fund. Founded by Susan McDonald and John Glencross, Calculus Capital created the UK's first approved EIS fund in 1999 and has a long track record of success. Calculus Capital focuses on investing in established companies that can deliver capital appreciation in a shorter timeframe. Our investment strategy is sector agnostic, investing in companies with capable management teams regardless of the industry. Our core investment team has been together for over 14 years, and brings together know-how from some of the world's leading financial institutions. With circa £150 million AUM, we are proud to have been awarded 'Best EIS Fund Manager' by the EIS Association for the third time in 2015. Please visit our website to find out more [www.calculuscapital.com](http://www.calculuscapital.com).



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.



Mary Rodgers  
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The EIS Association (EISA) is the official trade body for the Enterprise Investment Scheme. EISA is a highly effective not for profit organisation which exists to aid the provision of capital to UK small and medium-sized enterprises (SMEs) through the Enterprise Investment Scheme (EIS) and the Seed Enterprise Investment Scheme (SEIS). For further information about EIS or SEIS.

EISA works closely with HM Treasury, HM Revenue and Customs, Government Ministers, MPs and the FCA to enhance the EIS and promote the benefits of the scheme to investors and companies using EIS/SEIS and their respective advisers.



Simon Ruthers  
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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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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.



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.



Andrew Melville  
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EY is a leader in serving the financial services industry. We understand the importance of asking great questions. It's how you innovate, transform and achieve a better working world. One that benefits our clients, our people and our communities.

Finance fuels our lives. No other sector can touch so many people or shape so many futures. That's why globally we employ 26,000 people who focus on financial services and nothing else.

Our connected financial services teams are dedicated to providing assurance, tax, transaction and advisory services to the banking and capital markets, insurance, and wealth and asset management sectors. It's our global connectivity and local knowledge that ensures we deliver the insights and quality services to help build trust and confidence in the capital markets and in economies the world over. By connecting people with the right mix of knowledge and insight, we are able to ask great questions. The better the question. The better the answer. The better the world works.



Philip Salter  
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The Entrepreneurs Network is a think tank for the ambitious owners of Britain's fastest growing businesses and aspirational entrepreneurs. Through research, events and the media, we bridge the gap between entrepreneurs and policymakers to help make Britain the best place in the world to start and grow a business.



Customer Services  
020 8530 0852  
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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.



Customer Support Centre  
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The CISI is the largest and most widely respected professional body for the securities and investment industry in the UK and in a growing number of major financial centres globally. Since merging with the Institute of Financial Planning (IFP), together we will help to bring the highest standards of professionalism to all areas of the financial services industry and provide additional strength and an even greater presence in the Financial Planning sector.



Damian Davies  
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The Timebank is the most established outsource Paraplanning business in the UK. The role of a Paraplanner is to obtain data, analyse data and produce documents and reports. The Timebank understands that the details within that definition can be hugely different from firm to firm.

The responsibilities that The Timebank takes on for their clients includes data harvesting existing policy details, acting as a critical friend and sounding board to advisers, producing reports, TVAS calculations, reviews and suitability letters, conducting research and due diligence, completing compliance functions and any other task that helps an adviser spend more time with their clients.

The team at The Timebank include support staff and Paraplanners qualified to QCF6 level.

Advisers can engage with The Timebank with either pay as you go or retained relationships, meaning the right service is available for every firm.



Customer Services  
020 8989 8464  
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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.

## We'd love to hear your thoughts...

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 Industry Report       SITR Industry Report  
 BPR Industry Report       BPR Masterclass  
 VCT Industry Report       VCT Masterclass

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

How far were the learning objectives met?

Not met       Some met       All objectives met

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	<input type="checkbox"/>	<input type="checkbox"/>
Philip Salter	<input type="checkbox"/>	<input type="checkbox"/>
Matt Taylor	<input type="checkbox"/>	<input type="checkbox"/>
Damian Davies	<input type="checkbox"/>	<input type="checkbox"/>
Henny Dovland	<input type="checkbox"/>	<input type="checkbox"/>
Robert Davis	<input type="checkbox"/>	<input type="checkbox"/>
Madeleine Ingram	<input type="checkbox"/>	<input type="checkbox"/>
Simon Ruthers	<input type="checkbox"/>	<input type="checkbox"/>
Andrew Melville	<input type="checkbox"/>	<input type="checkbox"/>
Andrew Marris	<input type="checkbox"/>	<input type="checkbox"/>

If you were to recommend this event to a colleague, what would you say?



# 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](http://www.tolley.co.uk/extraining_t&c)

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Sam Rees-Adams

Head of External Accreditation, Chartered Institute for Securities & Investment

*"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 welcomes thoughts and comments to help shape the development of this event. If you would like to provide feedback, please visit our website or email:

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Intelligent Partnership has achieved CPD accredited status for its education programmes on Alternative Investments from both the Chartered Insurance Institute (CII), Personal Finance Society (PFS) and Chartered Institute for Securities & Investment (CISI).

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