



**BPR**  
**MASTERCLASS**

**28.04.2015**

# 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



## Supporters



## Accreditation



Hello and thanks for attending our **BPR masterclass**, kindly supported by **BDO**, industry experts and thought leaders from four **BPR providers**.

With the Nil Rate Band frozen at £325,000 per person and after years of rising asset prices, more and more people are finding that their estate will be liable for inheritance tax upon their death.

However, longer retirements (amongst other things) mean that traditional estate planning solutions do not always meet the needs of clients. We are finding that investment products that utilise Business Property Relief are increasingly being used to fill that gap, and advisers who want to be able to offer the full suite of estate planning solutions to their clients need to have an awareness of them.

This BPR masterclass is designed to help you acquire the technical knowledge you need to be considered an expert. You will earn 3 hours of structured CPD; hear the latest views on how BPR fits in with more conventional estate planning strategies; learn the key questions to ask when carrying out due diligence and the important considerations when assessing client suitability; find out more about the different BPR qualifying asset classes and the product providers' investment processes and get the latest on how HMRC view this relief.

Today's event is aimed at advisers who are already undertaking estate planning for their clients and are familiar with conventional asset reduction strategies that utilise gifts and trusts; but who want to learn more about asset replacement strategies that rely upon BPR - and in particular, the suite of BPR products that have been developed over the last decade.

The event will also mark the launch of Intelligent Partnership's 2015 BPR Industry Report. Between the masterclass and this new report, I hope attendees will really feel they have gained a strong grasp of this market. As ever, the focus is on research and education, with minimal product push.

Advisers will leave the event feeling safe and confident about how best to use BPR within their business. Most importantly, attendees will be equipped to deliver a service that is hugely valued by their clients.

Thanks for attending this morning and please do take the opportunity to speak with me or one of my team if you want to find out more about what we do and what we have coming up.

**BDO**  
55 Baker Street  
London  
W1U 7EU

**Tuesday 28<sup>th</sup> April 2015**  
08.45 - 14.00

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



**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 BPR 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 VENUE



55 Baker Street



EC4A 4HH



Classroom

# BUSINESS PROPERTY RELIEF

We know that the baby-boomer generation make up the backbone of most advisers' client banks, form the largest cohort of the UK population and control over 80% of private wealth. As they finish their working lives and start to look ahead, for many of them ensuring that they pass on their wealth becomes a significant financial planning objective.

This is brought into even sharper focus for advisers when we consider that with the nil rate band frozen and asset prices rising, it is estimated that 5,000 more estates a year will be liable for IHT by 2019. So mitigating IHT is no longer just a problem for the very wealthy, but now affects the mass affluent as well.

We also know through research that estate planning is an area where advisers can really add value for their clients - three quarters of consumers are not confident that they could effectively reduce their Inheritance Tax Liability without professional help.

However, traditional IHT solutions, such as gifts and trusts, are not always flexible enough to cope with the challenges created by increasing life expectancy. It is very difficult for advisers to predict if the assets they plan on placing outside of their client's estate will be needed at some point in the future - perhaps to fund a longer than expected retirement or provide for residential care. Many clients are also put off by the seven year time frame before traditional solutions provide 100% mitigation. Gifts and trusts can also be complex to set up and administer.

These are some of the key drivers behind a quiet but meaningful increase in the market for a range of investment products that provide access to BPR. Known as Inheritance Tax Services, Inheritance Tax Solutions or Estate Planning Services, these products utilise Business Property Relief to help advisers mitigate the impact of inheritance tax on their clients' estates.

Originally conceived as a way of reducing the burden of inheritance tax on small businesses, BPR has evolved into a small industry of focused investment products that promise to help suitable investors mitigate their IHT bill. In contrast to more conventional solutions, BPR products promise swift relief, uncomplicated structures and ongoing access to the funds.

Now BPR products aren't going to be for everybody. They come with risks attached: there is investment risk, liquidity risk and no cast-iron guarantee of IHT relief. But the industry is maturing, the products have a good track record and the speed, simplicity and ongoing access BPR products provide are attractive benefits for many clients.

BPR products are now firmly established, reasonably well understood and offer a plethora of potential solutions in the estate planning market. Looking forward, the expectation is that we will see increased levels of investment into BPR products over the next five years as estate planning moves up the agenda for many consumers.

# 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 BPR in context

David will put BPR products in the broader context of estate planning, looking at the limitations of conventional solutions and how they can be overcome by the use of BPR. He will also take a look into the (near) future and give us his opinions on any potential changes post-election!

David Brookes  
BDO



## 09.25 Due Diligence - How to Source and Assess a BPR product

Henny will take us through what advisers need to consider when they are researching BPR products: What are the best criteria when it comes to product selection? What are the most pertinent questions to ask providers? How can advisers filter the market to source the most appropriate products for clients? Henny will give us practical guidance on this essential step in advisers' process.

Henny Dovland  
TIME Investments



## 09.45 Client Segmentation and Suitability

What sort of clients are suitable? At what point (any point?) do the tax benefits outweigh the investment risks? What sort of attitude to risk should clients have? How do you segment your client bank and how do you start the conversation with suitable clients? Jason will look into these issues that are critical to doing successful business with BPR investments.

Jason Butler  
Bloomsbury Wealth



## 10.05 The BPR universe off AIM

Most advisers tend to think of BPR products as something that are only based around investments on AIM, but in fact there are a range of products that have been developed around investing in unquoted assets. Gabrielle and Eddie will review the range of non-AIM products and look at the risks and benefits of accessing BPR this way.

Gabrielle Beaumont  
Ingenious Investments



Edward Grant  
Ingenious Investments



## 10.25 Questions panel



David, Henny, Jason, Gabrielle and Edward will be on a panel to answer your pre-submitted questions.

# 10.45

## 10.45 Coffee break



Coffee, tea, refreshments and networking.

## 11.05 Lifting the Lid on Liquidity and BPR

There is a tension within BPR investments - one of the major selling points is investors do not have to sacrifice having access to the funds, but the assets themselves tend to be illiquid. Simon and Oliver will examine this important issue in detail and outline how managers are able to manufacture liquidity for their investors and what implications that has for their returns and tax situation.

Simon Ruthers  
Oxford Capital



Oliver Hughes  
Oxford Capital



## 11.25 Evasion, avoidance, planning and BPR

Danby will guide us through this thorny issue, looking at the new perspective on avoidance as "gaining an advantage Parliament never intended" and what this means for BPR. Are investors exposed to the risk of being seen as using an avoidance scheme or not qualifying for BPR upon application?

Danby Bloch  
Tax Briefs



## 11.45 The BPR universe on AIM

Following on from Ingenious' presentation earlier, Justin will look at the BPR universe on AIM: how big the universe is, how best to access it and what particular risks and benefits it presents to investors seeking BPR.

Justin Waine  
PUMA Investments



## 12.05 Client Case Studies

Rounding off the morning, Tony will talk us through some real examples of how BPR can be used in various common (and not so common) scenarios.

Tony Müdd  
St James's Place



## 12.25 Questions panel

Danby, Justin, Simon, Oliver and Tony will be on a panel to answer your pre-submitted questions.

## 12.45 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



# Schedule

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

8



**Jason Butler**  
BLOOMSBURY WEALTH

Jason has worked in financial services since 1990 and founded **Bloomsbury** in 1998 and he provides strategic oversight and counsel on wealth planning throughout the firm.

He is qualified as a Chartered Wealth Manager, Certified Financial Planner, a Chartered Financial Planner and holds advanced pension and investment management qualifications.

He was awarded the Tony Sellon Memorial Prize for outstanding contribution to the development of the financial planning profession in 2001 and is a visiting lecturer on financial planning and an honorary Fellow of Northampton University. The second edition of his book - The Financial Times Guide to Wealth Management (2nd Edition) - was published in November 2014.



**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.



**Gabrielle Beaumont**  
INGENIOUS INVESTMENTS

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

Prior to joining Ingenious in 2009, Gabrielle qualified as a Chartered Accountant and Chartered Tax Adviser with Deloitte, where she worked for over six years in their Real Estate Tax group in London specialising in the taxation of real estate transactions and international property holding structures.

Gabrielle has a BSc (Hons) degree in Geography from the University of Birmingham, and is a member of the ICAEW and the Chartered Institute of Taxation.



**David Brookes**  
BDO

David is a Fellow of the Institute of Chartered Accountants and has over 20 years' experience in tax compliance and advisory work.

David is the Head of Tax at **BDO** in Reading and leads BDO's specialist team dealing with SEIS/ EIS / VCT, inheritance tax business property relief (BPR) and other tax efficient investments.

He has acted for both the fund promoters and the high net worth investors. He also acts for estates and deals with HMRC queries on inheritance tax BPR claims.

David writes the 'Venture Capital Taxes' book which covers EIS, VCT and CVS and also chapters in 'Revenue Law - Principles and Practice' and 'Tax Planning', all published by Bloomsbury Professional.



**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.



**Henny Dovland**  
TIME INVESTMENTS

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



**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.

9





**Oliver Hughes**  
OXFORD CAPITAL

Oliver is responsible for leading infrastructure investments at **Oxford Capital**. Oliver has been working in the finance industry for over 15 years. He started his career with Baring Brothers and consequently ING Barings.

After an initial period based in London, Oliver spent over 10 years in Asia focusing primarily on the structured finance markets, developing and designing complex asset backed transaction structures in a variety of asset classes and new legal jurisdictions. While continuing to maintain a focus on the structured finance side of the markets, more recently, Oliver has been actively developing renewable assets with a specific focus on Solar PV and Wind.



**Danby Bloch**  
TAX BRIEFS

Danby Bloch is chairman of City of London based independent financial advisers and employee benefit consultants Helm Godfrey. He is also a non-executive director of the investment platform Nucleus Financial. In addition he is a specialist consultant at **Centaur Media PLC**, to which he sold his publishing business **Taxbriefs**. Danby has written several books on financial planning issues and hundreds of articles about financial subjects in the professional and national press.

He is chair of the Oxford Playhouse, a trustee of the Equal Rights Trust and a patron of the Friends of the Pitt Rivers Museum. He was chair of governors and Pro-Chancellor of Oxford Brookes University.



**Justin Waine**  
PUMA INVESTMENTS

Justin graduated from Oxford with a degree in PPE. He joined Cazenove & Co as a sell side research analyst responsible for small and mid-sized companies.

In 2003, Justin joined Polar Capital Partners as a fund Manager on European Funds. This included managing a significant portion of the award-winning European Forager Fund; an absolute return fund focused on Pan-European small and mid-sized companies. Justin was responsible for investment across the whole of Europe, but predominantly focused on the UK, Germany and Switzerland, including companies listed on AIM.

Justin therefore has 16 years' experience of analysing UK and European small and mid-sized companies.



**Tony Müdd**  
ST JAMES'S PLACE

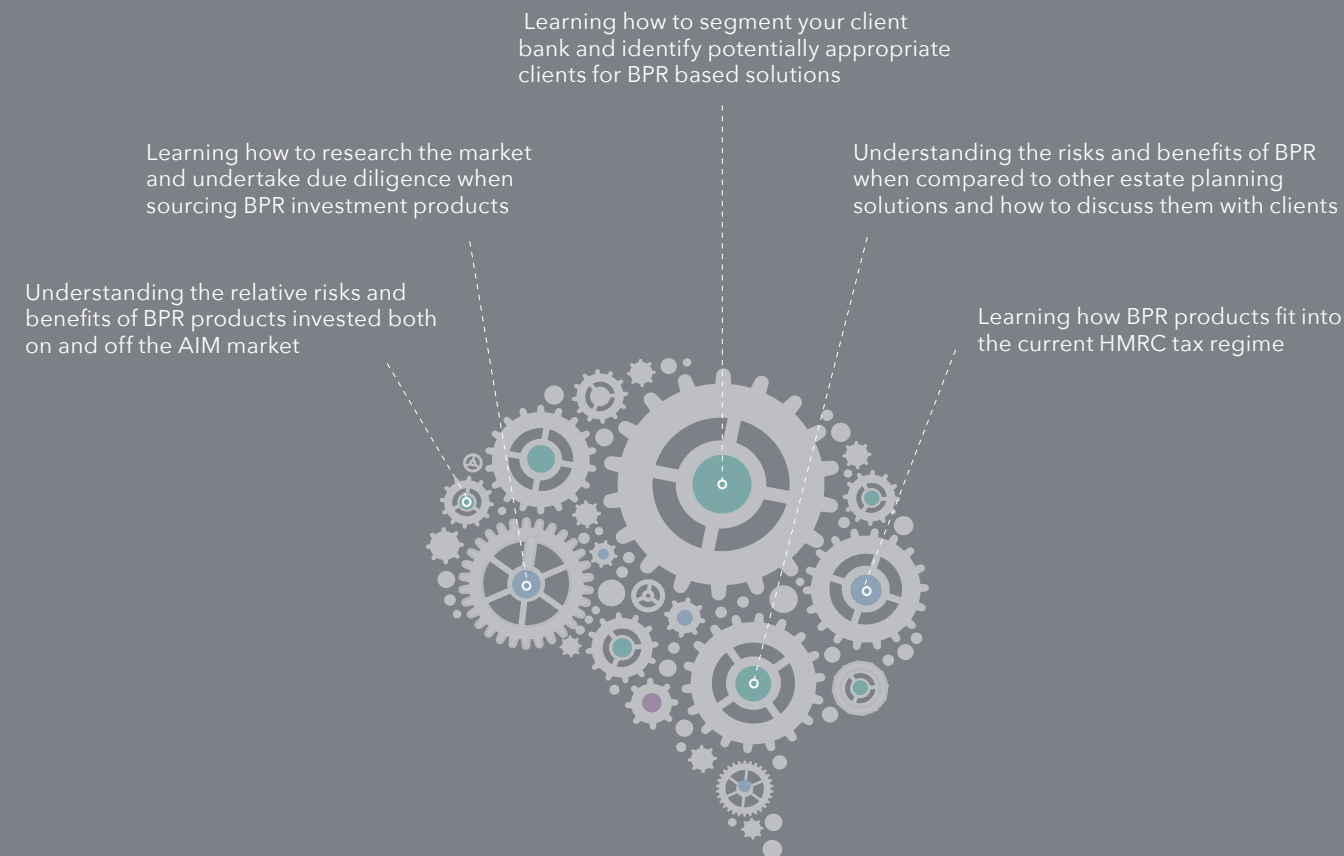
Tony has spent over 21 years at **St James's Place** within the Business Development division in a wide variety of roles.

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:



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



Danby Bloch  
020 7970 4142  
danby.bloch@taxbriefs.co.uk  
[www.taxbriefs.co.uk](http://www.taxbriefs.co.uk)

Centaur Financial is part of Centaur Media PLC. The Centaur Financial portfolio includes several multi-award winning and long-trusted publication brands, innovative digital products as well as industry-leading specialist events and high-value data-driven content.

The portfolio includes brands such as Money Marketing, Fund Strategy, Corporate Adviser, Mortgage Strategy, Taxbriefs, The Platform and Headline Money.

Centaur Financial helps a senior audience of professional financial advisers, fund managers and product providers to keep a competitive edge with real insights and analysis of the latest trends, regulatory issues and thinking affecting the financial services industry.



Simon Housden  
020 7391 4749  
shousden@time-investments.com  
[www.time-investments.com](http://www.time-investments.com)

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.



Simon Ruthers  
018 6586 0760  
sruthers@oxcp.com  
[www.oxcp.com](http://www.oxcp.com)

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.



David Brookes  
011 8925 4445  
david.brookes@bdo.co.uk  
[www.bdo.co.uk](http://www.bdo.co.uk)

The principal activity of BDO is the provision of professional services to clients. We are a firm of Chartered Accountants and business advisers. We specialise in helping businesses, whether start-ups or multinationals, to achieve their goals. Through our own professional expertise and by working directly with organisations, we have developed a robust understanding of the factors that govern business growth. Our objective is to use this to help our clients maximise their potential.

Our strength in the market place is mirrored in our achievements – FT Best Workplaces, The Sunday Times 100 Best Companies to Work For, The Times Top 50 Where Women Want to Work, Best Innovation in client service or relationship management, Audit and Accountant of the year award, and Tax adviser of the Year to name a few of our accolades.

Nothing matters more to us than our clients. All our energy is centred on giving you exceptional service.



Tony Müdd  
012 8587 8268  
Tony.Mudd@sjp.co.uk  
[www.sjptruepartnership.co.uk](http://www.sjptruepartnership.co.uk)

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.



Gabrielle Beaumont  
020 7319 4129  
gabrielle.beaumont@ingeniousinvestments.co.uk  
[www.theingeniousgroup.co.uk](http://www.theingeniousgroup.co.uk)

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.



**PUMA INVESTMENTS**  
Calculated Excellence

Hugh Rogers  
020 7408 4067  
hugh.rogers@pumainvestments.co.uk  
[www.pumainvestments.co.uk](http://www.pumainvestments.co.uk)

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 Inheritance Tax Services, VCTs and EIS. Puma has raised over £200m in tax efficient investments.

Puma Investments has two discrete BPR qualifying offerings: Puma AIM Inheritance Tax Service and Puma Heritage PLC. Puma AIM Inheritance Tax Service is a discretionary portfolio service that seeks to mitigate Inheritance Tax by investing in a carefully selected portfolio of AIM shares. Puma Heritage PLC, through its wholly-owned subsidiary, undertakes trading activities with the principal aims of preserving capital and generating stable returns for shareholders whilst seeking to offer downside risk protection.



Jason Butler  
020 7965 4480  
jasonbutler@bloomsburywealth.co.uk  
www.bloomsburywealth.co.uk

Bloomsbury is a multi-award winning Accredited Financial Planning Firm and wealth management 'boutique' based in Central London. Since it was established in 1998 the firm has pioneered the integration of lifestyle planning, structured financial planning and investment management, to provide an integrated and seamless wealth management service.

The team of 11, including five Certified/Chartered Financial Planners, oversees about £300M of wealth for a small number of wealthy families, of which £168M is managed in-house on a non-predictive, discretionary basis. The firm most recently won the New Model Adviser of the Year award for Greater London, on the strength of its client communications, innovation and level of professionalism.

Bloomsbury has been part of Raymond James Investment Services Limited since 2005. New clients come predominately by referral from existing clients and a number of professional connections including tax advisers, accountants, solicitors, other financial advisers and trust companies.



Customer Services  
020 8530 0852  
customer.serv@cii.co.uk  
www.thepfs.org

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 accross 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 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.



Membership Team  
0117 945 2470  
enquiries@financialplanning.org.uk  
www.financialplanning.org.uk

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<sup>SM</sup> 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 ☐ VCT Masterclass  
☐ EIS Industry Report ☐ VCT 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"/>
David Brookes <i>BDO</i>	<input type="text"/>	<input type="text"/>
Henny Dovland <i>TIME Investments</i>	<input type="text"/>	<input type="text"/>
Jason Butler <i>Bloomsbury Wealth</i>	<input type="text"/>	<input type="text"/>
Gabrielle Beaumont <i>Ingenious Investments</i>	<input type="text"/>	<input type="text"/>
Edward Grant <i>Ingenious Investments</i>	<input type="text"/>	<input type="text"/>
Simon Ruthers <i>Oxford Capital</i>	<input type="text"/>	<input type="text"/>
Oliver Hughes <i>Oxford Capital</i>	<input type="text"/>	<input type="text"/>
Dandy Bloch <i>Tax Briefs</i>	<input type="text"/>	<input type="text"/>
Justin Waine <i>Puma Investments</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 BPR 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](https://intelligent-partnership.com/events)  
[events@intelligent-partnership.com](mailto: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 BPR 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](https://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.

powered by  
**intelligent.  
partnership** \*

### Intelligent Partnership

Halford Chambers  
1-3 Halford Road  
Richmond  
TW10 6AW

Company Registration No. 06442114  
Company registered in England and Wales

---