BPR SHOWCASE
London

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17.05.2016

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 5000+ 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 educational 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 of Securities and Investment (CISI) and Personal Finance Society (PFS).

We also keep over 12,000 subscribers up to date with the latest news and developments in alternative investments via our Briefing and Spotlight email services, and we run showcase events where investment providers can present to, and meet with, intermediaries.

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.

Supported by

BLACKFINCH · Downing · Foresight group · INGENIOUS INVESTMENTS · OCTOPUS INVESTMENTS · OXFORD CAPITAL · TIME INVESTMENTS · TriplePoint

TODAY'S AGENDA

08.30 Registration

09.00 Opening Remarks

Dan will kick us off by setting the scene and letting you know how the morning is going to shape up. We'll also have a live draw to determine the order of the Fund Managers' presentations

09.05 BPR Fund Manager Elevator Pitches

Each Fund Manager will get three minutes to get your attention with a punchy introduction

09.40 BPR Fund Manager Presentations - (I)

Getting down to brass tacks - the first four in-depth presentations from the Managers, outlining the unique selling points of their product as well as covering key metrics such as costs, target returns and track record

10.40 Coffee Break

Coffee, tea, refreshments, networking and pre-arranged meetings with the Managers

11.20 Introduction to the afternoon sessions

Welcome back and picking up on some of the key themes from the first session before launching into session two

11.25 BPR Fund Manager Presentations - (II)

The second four in-depth presentations from the Managers

12.25 Q&A

We'll put your questions - including any pre-submitted questions - to all eight of the Managers

12.40 Lunch

Buffet lunch, coffee, tea, networking and more meetings

London Stock Exchange
London
EC3M 3AG

17th May 2016
09.00 - 13.30

#BPRShowcase

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WHY ARE YOU HERE?

Well, the baby-boomer generation (those born between 1946 and 1965) control 80% of private wealth in the UK by some estimates. As they are now starting to retire, their financial objectives are changing, and they are starting to consider estate planning issues. However, they are faced with making provision for much longer retirements than any previous generation. This is where BPR qualifying investments come in, allowing investors to mitigate IHT without giving up control of their assets or sacrificing growth.

At the other end of the scale, BPR qualifying investments can help those baby-boomers whose parents are still alive but who have not made any provision for estate planning. With only a two year time-frame for 100% IHT exemption and as the only choice in scenarios where a lasting power of attorney is in place, BPR qualifying investments may also be a good option for the very elderly or very frail.

Many advisers are aware of these advantages, but our research tells us that they do not feel that they have enough time to conduct the necessary research into the sector to source investments. The Showcase will help advisers address this problem by giving them the opportunity to review eight leading Fund Managers with a range of investment solutions and compare them side by side.

The format today is a little different to our educational events. Firstly, we're providing you with a comprehensive pack of information, with brochures and supporting literature from all of the participating fund managers, as well as a provider comparison matrix of key investment metrics from MICAP. You should get all of this in a folder you can take back to the office with you.

Secondly, we've got extended breaks to make sure you can maximise the opportunity to network with the fund managers and ask them any awkward questions you want to pose! A number of you will already have pre-arranged meetings set up, and our intention is to give you a chance to really get to know the managers and their offers, all in the space of one morning of networking and presentations.

Finally, as well as getting 3 minute "elevator" pitches from the managers when they introduce themselves, the presentations on the investment opportunities will cover information we know is crucial to you, such as the nature of the underlying investments, the returns on offer and what differentiates them from their competition. There are even some handy notes pages in the back of this brochure that have already been laid out to help you to make like-for-like comparisons.

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.

Guy Tolhurst

Managing Director
Intelligent Partnership

THANK YOU

TO ALL OF OUR ATTENDEES AND PARTICIPATING FUND MANAGERS

We hope that the event meets your expectations and helps advisers get to grips with the current market for **BPR qualifying investments**

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.

Matthew Bugden
INGENIOUS INVESTMENTS

Matthew is a Director of Ingenious, with primary responsibility for the company's fund raising activities and the development of new client relationships.

Matthew has over 16 years' experience in the retail and corporate banking sectors. In addition to extensive credit appraisal activities, he also dealt with a large number of television production and other media centric companies. Prior to joining Ingenious in 2001, he held a senior position with the UK's largest independent publishing company, where his role included close involvement in its broadcasting activities and the acquisition of three national newspaper titles.

James Faulkner
OXFORD CAPITAL

James looks after a number of Oxford Capital's key relationships with national accounts and wealth managers and advisors in London. He joined Oxford Capital late 2011, bringing with him over 20 years of business development and relationship management experience, most recently with PricewaterhouseCoopers. James is a Chartered Member of the CISI and has diplomas in Business Administration & Management and Investment Advice.

Gordon Pugh
BLACKFINCH

Gordon brings extensive experience working in the tax efficient investment sector. He started his career in the Enterprise nvestment Scheme team at Close Brothers Investment where he was involved with a number of technology, pub and film EIS companies as well as VCTs and inheritance tax mitigating trading companies. He then joined Octopus distributing VCTs, IHT portfolios and EIS products.

Subsequently, he helped to start up Stellar Asset Management and was involved with forestry, hotel, farming, EIS funds and their trading companies for IHT. He has also been involved with investment within the media sector since 2002, including numerous films for UK television. Gordon has the IMC and completed the first stage of the CFA.

Nick Morgan
FORESIGHT

Nick joined Foresight in 2012 and is responsible for the development and distribution of Foresight's retail products. Previously Nick spent five years at Octopus Investments. Prior to Octopus Nick was a sales consultant with Trailfinders Ltd following a period of extensive travel in the Far East, Africa and Americas. Nick holds a BSc in Economics and Economic History from Bristol University.

Mark Williams
OCTOPUS INVESTMENTS

Mark is Head of Strategic Partnerships at Octopus. He leads a team of seven business development professionals focused on building distribution relationships with firms sitting within five distinct channels: Financial adviser networks, national accounts and service providers; private banks and high net worth wealth managers; family offices; investment platforms; and solicitors and accountants.

Mark joined Octopus in 2011, bringing with him several years' experience working in private client wealth management with PricewaterhouseCoopers and HSBC Private Bank. Mark has a degree in Management Science from Warwick University and is a Chartered Accountant.

Henny Dovland
TIME INVESTMENTS

Henny Dovland joined TIME in January 2014 as the Business Development Manager for London. Over the last seven years Henny has worked exclusively with financial advisers, wealth managers and private banks helping planners add value to their client bank and their professional connections. She spent nearly six years at Octopus Investments before joining TIME and is a regular speaker at industry events.

Originally from Norway, Henny came to the UK in 1999 as part of her degree studies and loved it so much she decided to stay.

Laurence Callcut
DOWNING

Laurence is a Partner and Head of Sales at Downing where he has been since 2004. His financial services career spans over 30 years working previously with major insurers in management, marketing and sales roles. Laurence is a Chartered Insurer, and Member of the Securities & Investment Institute.

Edward Grant
INGENIOUS INVESTMENTS

Edward is a Senior Investment Director in the Client Relationship Team at Ingenious, responsible for a team of managers across the south developing relationships with investors and their financial planners.

Edward is a Chartered Financial Planner and a Fellow of the Personal Finance Society. A passionate advocate of the financial planning profession, Edward is a past president and board member of the Personal Finance Society, the largest UK financial services professional body and a current Vice President of the Chartered Insurance Institute and the Insurance Institute of London, the CII's largest institute with over 15,000 members.

He has held a number of management roles within international life offices including Zurich Financial Services, Royal & Sun Alliance and Providence Capitol.

James Hipkiss
OXFORD CAPITAL

James leads the team that manages Oxford Capital's relationships with wealth managers and advisors. He joined Oxford Capital in late 2014 after almost fifteen years as an Equity Salesperson with Goldman Sachs, Merrill Lynch and latterly Berenberg, where he was Head of Scottish Clients. James graduated with a first-class MA (hons) in Modern History from the University of St Andrews.

Belinda Thomas
TRIPLE POINT

Belinda is a Triple Point Partner and leads the sales and marketing team. She joined Triple Point in 2009 to manage relationships with intermediaries, professional advisers and existing investors.

Belinda oversees Triple Point's focus on creating value through the building partnerships with advisors, whilst also ensuring that Triple Point's marketing and communication supports these activities. She has brought a wealth of experience to the role, having worked within the sector for 16 years.

Belinda graduated from the University of Newcastle and qualified as a Chartered Accountant at PwC. She is a chartered wealth manager and a chartered fellow of the CISI. Belinda joined Triple Point after eight years at Schroders Private Bank, where she was a Client Director.

Speakers

BLACKFINCH

RANKING /8

HIGHLIGHTS

CONSIDERATIONS

QUESTIONS

NEXT STEPS

Foresight group

RANKING /8

HIGHLIGHTS

CONSIDERATIONS

QUESTIONS

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Downing

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QUESTIONS

NEXT STEPS

Notes

THANK YOU
FOR ATTENDING THIS BPR SHOWCASE

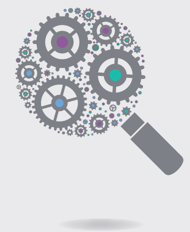
Here at **Intelligent Partnership** we organise these types of events for advisers:

Masterclasses

Taking place throughout the UK, our Masterclass events are designed to give advisers in-depth technical knowledge on alternative investments. With insights from high quality speakers encompassing investment providers, compliance experts, advisers and practitioners, they are CPD accredited and the content is carefully curated to ensure there are no sales pitches.

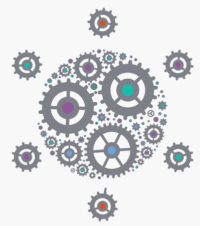
Showcases

Our Showcase events give advisers the opportunity to hear alternative investment providers present their investment opportunities on a like for like basis. Unlike other events, we ensure that the content of the presentations covers all of the key issues that exercise advisers, so the presenters cannot just play to their strengths.



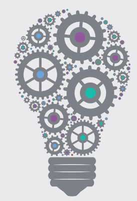
Roundtables

By participating in our Roundtable discussions advisers can learn more about how their peers are using alternative investments, voice their opinions on the industry and help influence investment providers' product development. Our Roundtables are a unique forum for discussion of topics that get little coverage elsewhere.



Alternative Investment Summit

Aimed at advisory firm principals, key decision-makers and industry professionals, the Summit covers the entire alternative investment universe. Leading industry figures discuss the key topics that are affecting advisers, planners, compliance functions, regulators and investment providers.



For more information visit intelligent-partnership.com

You're on the road to mastery...

Engage with our entire programme of reports, education, events and weekly e-mails to keep up to date and feel confident about the whole investment universe.

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Intelligent Partnership

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