



P R E S S R E L E A S E

GROWTHINVEST LAUNCHES MANAGED PORTFOLIO SERVICE

GrowthInvest, the independent platform for advisers and their clients in the tax efficient investment arena, announces the launch of its new discretionary Managed Portfolio Service. The diversified and generalist portfolio will leverage the experience and expertise of the investment team to select the most promising companies that have passed through the GrowthInvest due diligence process.

The service goes live at the same time that many of the larger funds have begun to announce full capacity, thereby offering a compelling solution for investors and advisers still looking to commit funds prior to the Tax Year end on 5th April.

The new portfolio service boasts a heavy-hitting Investment Committee, with over 100 years of combined investment experience between them, across the whole gamut of the retail and corporate investment sector. As well as Daniel Rodwell, MD of GrowthInvest, the Investment Committee includes Mark Brownridge, former Head of Research & Development at Mazars, Graeme Stenson, former Director at Coutts and Kleinwort Benson, and Stuart Jeffrey, an experienced corporate financier. The Service will be managed by Sapphire Capital Partners, under the Investment Direction of Boyd Carson, who has over 30 years' investment experience and recently took home two EISA awards.

Daniel Rodwell, Managing Director of GrowthInvest said:

"Our new discretionary portfolio service offers regulated access to the most promising companies on the GrowthInvest platform. Each has been hand-selected by our experienced investment team, based on strength of concept and performance in our stringent due diligence process. We have an excellent pipeline of true opportunities and are delighted to bring the best of these to the market within an FCA regulated fund. We feel that the portfolio service offers advisers a further level of diversification when building a portfolio of the numerous funds on the platform, as they are now also able to access the single company offers through this discretionary wrapper."

David Lovell, Operations Director at GrowthInvest adds:

"Advisers have been impressed with our asset transfer capabilities for clients with off-platform Alternative Finance Investments, and are delighted that our platform and due diligence processes now encompass funds and portfolios as well as single companies, and include recognised reports from industry providers. However, they have also provided very clear feedback that they often like the look of the single company opportunities available on GrowthInvest, but do not feel comfortable advising their clients to invest outside a regulated fund structure.

"That has all changed today with the launch of our discretionary managed portfolio and we are very excited about the next phase in our growth as a company."

Allocations can be EIS only, SEIS only, or a blend of the two, and the initial feedback from existing adviser clients has been encouraging. Whilst the Portfolio Service has an evergreen structure, there is currently significant capacity for a portfolio of pre-vetted investee companies to be deployed prior to the end of the 2016/17 tax year.

GrowthInvest will be actively promoting the service across its co-ordinated programme of pitch presentations, round-table lunches and regular adviser email communication channels.

NOTES TO EDITORS:

GrowthInvest www.growthinvest.com

GrowthInvest is a unique, independent platform which provides access to tax efficient investments for a growing network of UK financial advisers, wealth managers and investors. The Platform aims to bring the advantages of early stage investing to a wider audience of investors and advisers, who are in a position to benefit from the higher returns these companies potentially offer and tax efficiency via government sponsored schemes. The purpose built technology allows clients to consolidate, control and enhance their investment portfolio within a single, secure online portal. Originally founded by financial advisers in 2012 as the Seed EIS Platform, the company rebranded as GrowthInvest in October 2016 in order to better reflect the wider range of products and services available.

Daniel Rodwell, Managing Director, GrowthInvest

Daniel was a founding investor in GrowthInvest (originally Seed EIS Platform) and has been Chairman of the Investment Committee since June 2012. He became Managing Director in late 2014. During his tenure he has overseen numerous investment rounds into SEIS and EIS qualifying companies. Prior to this he worked in finance for nearly 20 years, managing institutional and private funds focusing on equities and derivatives. Daniel managed the UK division of Van der Moolen Equities AG and more recently founded the equity derivatives boutique Ten Derivatives LLP.

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