

Continuing Professional Development Certificate

Who has benefitted from venture capital and what can EIS do for me and my clients?

Date: Thursday 2 March 2017

Time: 1.15pm - 2.00pm

Speaker: Mark Brownridge, Director General, Enterprise Investment Scheme Association

In this IIL lecture Mark Brownridge discussed how financial planners can use EIS within a financial planning context and broke down some of the myths and misconceptions that surround EIS to help planners become confident in either starting to advise in this area or to increase their levels of business in this area.

EIS is becoming accepted as a mainstream investment but for many planners it can still be an area of advice where they don't feel confident giving advice to clients. But clients are seeing pension limits reduced, tax bills rise and are increasingly interested in small company investing. To help planners advise more comfortably in EIS and stop them losing clients or perhaps even gain new ones, this lecture busted some of the myths of advising in EIS and gave practical advice as to how you can benefit both your clients and your business by understanding more about advising in EIS.

By the end of this lecture members would have gained an insight into:

- how to advise clients and undertake DD and research on EIS easily, quickly and effectively
- practical ideas on how to advise in EIS compliantly and competently
- how you can develop your EIS proposition and give client scenarios where EIS can be used as part of a financial plan



This lecture or podcast can be included as part of your CPD requirement should you consider it relevant to your professional development needs. It is recommended that you keep any evidence of the CPD activity you have completed and upload copies to the recording tool as the CII may ask to see this if your record is selected for review.