

Training resources

The Tax Enhanced Market

The Government has a clear policy of encouraging investment into smaller companies through a range of tax enhanced products. They have made it clear that the tax reliefs are designed to compensate for the risk that investors will take in this market.



The range of Government approved products now encompasses Enterprise Investment Schemes (EIS), Seed Enterprise Investment Schemes (SEIS), Venture Capital Trusts (VCT), Business Property Relief (BPR) and Social Investment Tax Relief (SITR).

From an investor's point of view there is growing interest in tax enhanced products. This interest is being driven by two important factors:

- ▶ The reduction in the pension cap means that more people are now looking at alternative tax enhanced products to pensions as a means to supplement their saving for retirement.
- ▶ Uncertain and flat stock markets mean that investors are now looking for new ideas for investments that offer genuine growth potential.

We know from talking to wealth management and financial planning firms that an increasing number of their clients are raising the subject of tax enhanced products.

The need for training

We know that advisers will only be happy talking to their clients about a product if they are confident in it and understand it. That confidence is borne of knowledge.

We also know that if advisers do not offer tax enhanced products to their clients, they run the risk of the clients going elsewhere.

It is also true that most advisory companies do not have a depth of in-house knowledge about tax enhanced products, so there is a need for an external resource.

Training modules

At Hardman & Co we have developed a range of training modules that encompass:

- ▶ Introduction to the tax enhanced market
- ▶ Risk, reward and suitability
- ▶ Investment process and due diligence
- ▶ Fees and how they vary
- ▶ Reporting and exits
- ▶ Measuring performance
- ▶ Practical aspects, including tax reliefs, platforms, and further support

These modules can be developed according to the need of our clients.

Training delivery

Our training courses are delivered via seminars and workshops for our clients. We feel that the interaction we create in these is essential in understanding the nuances of this market, and allows the free exchange of questions and answers.

These courses can be delivered in your offices, or ours, or in a neutral setting.

Why Hardman & Co

Founded over 20 years ago, Hardman & Co is an FCA registered capital markets research and consultancy business, with offices in London and Edinburgh. We have built a reputation for research and consultancy of the highest quality.

Uniquely in the tax enhanced market we are able to draw on sector specialists who can provide direct relevant commentary on the funds and products under review. These specialist areas include agriculture, life sciences, building and construction, media and technology, to name but a few.

It is a depth of expertise that we believe is unrivalled in the industry.

We have now used this expertise to create and provide high quality training courses that are designed to deliver knowledge and confidence to the participants.

Contact details

In the first instance please contact:

Richard Angus

Head of Business Development
Email: ra@hardmanandco.com
Tel: 020 7148 0548

Dr Brian Moretta FFA

Head of Tax Enhanced Services
Email: bm@hardmanandco.com
Mob: 07979 004171

London Office

Hardman & Co
11-12 Tokenhouse Yard
London EC2R 7AS
Tel: 020 7929 3399

Edinburgh Office

Hardman & Co
9-10 St Andrew Square
Edinburgh EH2 2AF
Tel: 0131 718 6272

Website

hardmanandco.com