

Investing for Higher Returns and a Positive Impact with the Blackfinch Ventures EIS Portfolios

Scenario

Alongside risk appetite and financial plans, an investor's interests and concerns also influence their choices. Natasha is a successful entrepreneur who has exited an e-commerce business that she built over ten years. She's passionate about business, technology, supporting the economy and working for a positive impact.

Natasha saw a return on the investment in her business and profited from its sale. With cash to invest, she'd like to deploy funds into high-growth investments aligned with her principles.

Solution

Natasha is clear on the risks of early stage investment via an EIS. She knows these are offset by EIS tax benefits, and that she can further mitigate risks by holding a diversified portfolio. She also has direct experience of the benefits from managing her own business.

Natasha outlines her plans to her adviser who recommends the Blackfinch Ventures EIS Portfolios. Natasha researches the service and decides to invest based on the following about the team:

- Targets higher returns on investments over 4-7 years
- Invests in new and innovative technology firms
- Invests for a positive environmental, social and governance (ESG) impact
- Focuses on different sectors for a multi-sector portfolio of ten firms
- Is made up of technology experts and entrepreneurs
- Supports firms from investment to development to exit

Steps

- **Select amount to invest:** Confirm what the client will invest
- **Select portfolio:** Help client choose a portfolio aligned with their objectives
- **Make investment:** The portfolios are available for new and existing ISA transfers
- **Target Business relief:** The client can see Business relief after just two years (and if held at death)
- **Target a return:** The client's targeted return is based on the portfolio they selected

Solutions for Investors and Support for Advisers

Blackfinch is a tax-efficient investment specialist working in partnership with advisers to meet clients' requirements.

To find out more please speak to one of our team on **01452 717070** or email **enquiries@blackfinch.com**.

IMPORTANT INFORMATION

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