

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

Invest: Natasha invests £100,000 in view of the approach to risk management, including spreading investments across a multi-sector portfolio of ten firms.

Target higher returns: As funds are invested in high-growth firms, Natasha can target higher returns. The longer investment timeframe also supports stronger exits.

Ensure positive impact: With investments made in young, entrepreneurial technology firms with ESG at their core, this is aligned with Natasha's own ESG focus.

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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