

Effective Financial Planning Using EIS and BR Investments – Friday 7th December 2018

AGENDA

7:45	Registration and Breakfast Networking	
8:15	Welcome Introduction	Daniel Rodwell , GrowthInvest
8:30	EIS/BR Compliance – How to get it right	Rory Percival , Rory Percival Training and Consultancy Ltd
9:00	Panel Discussion – The EIS market. What's happening, why and what this means for your clients	Chaired by Lawrence Gosling , Editor in Chief, What Investment Panellists: Neil Forster , Ingenious Daniel Rodwell , GrowthInvest Jim Reeve , Great Point Media Donald Stark , Head of Investment Taxation HM Treasury Matt Ellams , Jenson Funding Partners
9:40	Effectively assessing BR investments	Dr Brian Moretta , Hardman & Co
10:10	How the regulator and PI insurers view EIS and BR investments	Chaired by Mark Brownridge , Director General, EISA Panellists: Ian Cornwall , PIMFA Eloise Ellis , Aston Lark
10:45	NETWORKING BREAK	
11:05	Panel Discussion – The BR market. What's happening in the BR market and how it affects your clients	Chaired by Lawrence Gosling , Editor in Chief, What Investment, Panellists: Simon Harryman , Ingenious Sam Jermy , TIME Investments Bethany Dudley , Foresight Dominique Butters , Blackfinch
11:45	Using EIS/BR Investments in a Financial Plan	Gordon Pugh , Blackfinch
12:20	Panel Discussion - Due Diligence & Research. How much is enough?	Chaired by TBC Panellists: Guy Tolhurst , Micap Richard Angus , Hardman & Co Simon Radford , MJ Hudson Allenbridge Marlene Outrim , UNIQ Family Wealth Debbie Mahanta , Puma Investments
13:00	Keynote	Jeff Lynn , CEO, Seedrs
13:30	Lunch	
14:30	CLOSE	