

EISA

Financial Planning Programme

Financial Planners, Wealth Managers & Regulated Advisers Don't miss your opportunity to join us for **FREE!**

The EIS and SEIS market continues to grow and offer significant financial planning opportunities. As a result more planners, managers and advisers are getting involved than ever before.

As a result the EIS Association (EISA) are reaching out to encourage Financial Planners, Wealth Managers and Regulated Advisers to join us and play a more active role in this increasingly mainstream area of financial planning. Accordingly, we have developed a new Programme specifically for Financial Planners, Wealth Managers and Regulated Advisers.



After becoming a member of EISA, you will be able to:

SAVE TIME

- EISA acts as a community for all things EIS/SEIS. You will find all the resources you need to conduct EIS/SEIS business in one place.
- You will obtain access to the leading industry experts with the opportunity to network with them and fellow professionals at regular events and seminars.
- We can help you get your voice heard by participating in our consultations with policy makers and providers saving you the time of acting independently.

REDUCE RISK

- Advising in the area of tax efficient investments can increase your compliance commitments due to the perceived high risk nature of these investments. EISA can help you mitigate these risks.
- You will receive regular regulatory and tax updates from our various specialist committees to make sure you are always up to date thereby reducing the risk of non compliance in your business.
- We offer training and development through our EIS diploma that will reduce the risk that advice your firm and individuals are giving in this area is inappropriate or below standard. The diploma is written by industry experts and due to the involvement of EISA and Intelligent Partnership you can take advantage of a quality, well respected qualification. We will also provide you with a logo that confirms you are an EIS Diploma qualified member.
- We will keep you informed about other industry events that can add to your knowledge, and in many instances provide CPD points.

INCREASE REVENUE

- EIS/SEIS are moving into the mainstream following rapidly growing demand from clients who are faced with cuts to pension allowances, higher than ever tax bills and a requirement for diversified, growth driven, investment portfolios. EIS/SEIS can add diversification to a client's existing investment portfolio and are attractive due to the combined advantage of tax relief and growth potential.
- Whether you are already actively advising on EIS/SEIS or are new to this area, EISA can connect you with the leading market participants, help you develop your EIS/SEIS proposition and give insights as to how EIS/SEIS can benefit clients in various financial planning scenarios so that you stand out from the crowd and potentially increase your revenue.

£1.9BN
INVESTMENT INTO EIS
IN 2016/17

UNIQUE BENEFITS

- **The EIS Association believe the EIS and SEIS fulfil much needed roles in encouraging private investment into growing British companies. By doing so, it benefits three key groups:**

THE GOVERNMENT - through increased employment and tax revenue. The Government recognises EIS and SEIS's contribution to the growth of the UK economy and the schemes are core to its strategy for the enterprise economy.

SMALL BUSINESSES - by providing access to equity funding to help them start, grow and build their businesses that they might not otherwise be able to.

INVESTORS - by giving them the opportunity to be involved at an early stage in exciting small companies which can potentially provide them with significant investment returns.

We continue to see the number of investors interested in EIS and SEIS grow and indeed 2016/2017 reached new record levels of investment into EIS (£1.9BN).

Below we have outlined the benefits you will enjoy from being part of the Programme:

SEMINARS/EVENTS – specifically targeted at your needs. Aimed at increasing education, awareness and incorporating EIS/SEIS into the financial planning recommendation process

COLLECTIVE VOICE - Through scale EISA achieves a dialogue and influence over the policymakers that advisers alone cannot. EISA provides a platform for all advisory firms to get their voice heard by policymakers and stakeholders governing the EIS/SEIS advice market. By pulling together as a united voice we gain power and influence to realise change that individuals could not achieve on their own.

LEGISLATION NEWS - News updates on legislation and policy changes straight to your inbox from our committees

QUARTERLY NEWSLETTER

BRANDING - A copy of the EISA logo to put on your website and in your emails to help promote your business

ONLINE RESOURCES - Access to the online member area

FREE RESEARCH - information, analysis and insight across the EIS/SEIS sector

INDUSTRY EVENTS - Regular invitations to free workshops, seminar and networking events from fellow members and other associations

SIGNIFICANT SAVINGS - with a range of partners e.g. special member discounts on PI insurance

LISTING - in the EISA Directory making you visible to clients and other professionals in the industry

SUPPORT - Access to our guides, webinars, checklists and planning ideas for financial planners to educate you about advising in this area.

For further information on EISA membership please contact Mary Rodgers on:

Phone: **0207 620 6789**

Email : **info@eisa.org.uk**

Web: **www.eisa.org.uk/eis-members**

EISA's mission statement is to support and promote policies and initiatives that facilitate the smooth flow of risk equity capital from private individuals to smaller companies thereby benefiting the UK economy. Our aim is also to help Financial Planners, Wealth Managers and Regulated Advisers to offer EIS/SEIS to their clients with confidence.

To sign up to be part of the Financial Planning Programme please complete the form below and return to:

**EISA, Member Services,
82 Blackfriars Road, London SE1 8HA**

or go to the application page on our website:

www.eisa.org.uk/eis-members

Name _____

Position _____

Company _____

Address _____

_____ Postcode _____

Phone _____

Email _____

Website _____

I agree to allow my contact details to be listed on the EISA membership database