

Plan to Grow – Thursday 5th December 2019**AGENDA**

8.30	Registration and Breakfast Networking	
9:00	Welcome Introduction	Gordon Pugh, Blackfinch
9:10	The EIS Panel Discover what's happening in the EIS market, where your client's money is being invested and strategies for how you can invest client's money with greater confidence. The session will also delve further into how fund managers put together a portfolio of investments, what role diversification can play and what impact costs have on both an initial investment and returns	Chaired by Stephen Jones, Clear Solutions Wealth & Tax Management Panellists: Daniel Rodwell, GrowthInvest Dan Perkins, Great Point Media Luke Barnatt, MJHudson Allenbridge Guy Ranawake, Ingenious
9:40	What next for Business Relief? The Government wants to make IHT simpler, more intuitive and easier to operate and has tasked the OTS with making recommendations to achieve this. The OTS has reviewed the scheme and has made 11 recommendations for a more understandable IHT tax system. Bill Dodwell tells us what those recommendations are and how they will help	Chris Springett, Smith & Williamson
10:00	The Investment Panel Hear from both those who have received funding from the schemes as well as individual investors themselves. How crucial was EIS/BR funding to their business, would they have survived without it and why do investors see startup and scaleups as such an exciting investment opportunity	Chaired by Debbie Mahanta, Director, Tilney Financial Planning Panellists: John Bailye, Side by Side Partnership Sunil Shah, 2019 Angel of the Year Jeffrey Faustin, Jenson Funding Partners Gordon Pugh, Blackfinch Moteefe

10:35	NETWORKING BREAK	
10:50	<p>Keynote</p> <p>Patrick Magee, Chief Commercial Officer at the British Business Bank gives us an overview of the SME investment market, what the current investment trends are and uncovers why the Bank, set up by the Government, continues to support small businesses and what they get in return for their investment in the schemes</p>	<p>Patrick Magee, Chief Commercial Officer, British Business Bank</p>
11:10	<p>The Compliance Panel</p> <p>Uncover the truth and hear from the experts as to what specific steps need to be taken when addressing compliance for tax efficient products. Learn how to develop your knowledge and understanding in this area, what best (and worst!) practice looks like, why its important to look at the whole of the market and how to establish your own compliance requirements in order to assess offerings quickly and easily</p>	<p>Chaired by Guy Tolhurst, Intelligent Partnership</p> <p>Panellists</p> <p>Tony Catt, TC Compliance Services Ltd Ewoud Karelse, Tilney Financial Planning Vanessa Johnson, Head of Discretionary Investment Management Services, Threesixty Services LLP Sam McArthur, Puma Investments</p>
11:40	<p>The Technical Bit</p> <p>Technical Connection take a look at the technical side of EIS and BR investing and give some practical tax and investment planning advice to use with clients</p>	<p>Edward Grant, Technical Connection</p>
12:00	<p>The Exit Panel</p> <p>Investors need a return on their investment so how do fund managers approach exits and how do they balance the need of the investor with the needs of the company? This session seeks to uncover the process behind a successful exit, what can be done to ensure more</p>	<p>Chaired by Bill Cunningham, Endeavour Ventures</p> <p>Panellists</p> <p>James Ramsay, TEPS Alexander Crawford, Calculus Capital Paul Munn, Par Equity Steve Harris, Committed Capital</p>

	of them and what the industry can do to get better at reporting performance	
12:30	<p>The BR Panel</p> <p>BR's popularity has surged in the past few years as increasing numbers of people accrue estates that may be subject to inheritance tax. Both the value of assets invested, and the number of products, has grown very quickly. However, how transparent is the industry and how can advisers review the market properly? In this presentation, the panel gives an overview of the BR market, strategy options and their prospects, and an insight into some of the potential issues.</p>	<p>Chaired by Neil Cole, UBS</p> <p>Panellists</p> <p>Dr. Brian Moretta, Hardman & Co Jonathan Gain, Stellar Asset Management Simon Harryman, Ingenious</p>
13:00	Goodbye Address	Matthew Steiner, Stellar Asset Management
13:10	<p>The Markets view of Small Caps</p> <p>Hear from Marcus Stuttard, Head of AIM at the LSE as he discussed the SME sector and the importance of helping more companies scale up so they can benefit from larger investments from AIM and other markets</p>	Marcus Stuttard, Head of UK Primary Markets & Head of AIM, London Stock Exchange
13:30	LUNCH	
14:30	CLOSE	