



## **1. GrowthInvest Profile**

GrowthInvest is a fast-growing UK based adviser platform, specialising in tax efficient and alternative investments. This growing market is becoming increasingly important to advisers and is under-served by incumbent main market platforms. Our technology is built around our specialist knowledge of the UK tax efficient investment industry and wider Private Markets sector. Our clients benefit from digital investment access to EIS, VCT, IHT and Private Market products. Alongside the ability to onboard historic client portfolios, enabling centralised portfolio reporting across all alternative assets.

GrowthInvest provides advisers and wealth managers with transparency, efficiency, and control around their alternative advice proposition for the first time. This gives significant cost savings to our clients alongside giving them the confidence to grow this area of their business.

Over the past 12 months we have seen huge adoption of our offering, significantly ahead of forecasts. Our AUA has grown 100% YoY and we now count some of the UK's largest firms as clients.

Our core platform service offers:

- A market-leading range of investment offers including EIS, SEIS, VCT, IHT and Private Market investments.
- Reporting on all alternative assets in one online secure portal (including the onboarding of historical assets)
- An extensive library of educational materials alongside research from independent partners
- Digital administration solutions and innovative products, such as our diversified VCT service.

## **2. Why did we want to sponsor the report**

GrowthInvest are delighted to sponsor the ESG & Sustainable Tax Efficient Products report because whether you are an investor or a company, big or small, Environmental, Social and Governance (ESG) reporting and investing is essential if you want to stay up to speed in the market, and has now become a regulatory requirement. We believe we can help advisers and their clients in a number of ways, and are delighted to become a sponsor. This report will provide advisers with a central resource tool which can play a major role in making well educated investment decisions, and assisting with a full understanding of their regulatory requirements, as well as how to best educate and explain to their clients.

## **3. What we are actively doing in the ESG & Sustainable space**

Here at GrowthInvest we feel we are positioned at perfect intersection between the requirements of both the Wealth Managers and IFAs and the Fund Managers to provide education as well as investment and administrative services. ESG is a very broad term and means different things to different people and it is no surprise that it was becoming a confusing space for advisers to guide their clients. We have been running our award-winning educational

Adviser Hour series since 2018, which first originated to help guide advisers through the tax efficient landscape. In 2021 we recorded our first ESG episode, which focused fully on the impact of ESG requirements in the tax efficient space as a whole. Since then we have recorded two further episodes to help keep advisers up to data with the ever changing ESG and sustainable investment landscape.

We bring in experts from the fund management world and experts like Lee Coates to provide a round table discussion on topical items such as the differences between ESG, Impact, Ethical and sustainable investing, UN PRI Signatories, B Corporations, frameworks to measure ESG criteria of companies and funds and more recently the FCA consultation paper on Sustainability Disclosure Requirements (SDRs) and investment labels. We also record individual interviews with guests to provide extra educational content.

As a platform, we encourage funds to disclose both their own ESG credentials, and also how they monitor their portfolio companies' commitment to this. The requirement by the FCA for funds to justify their ESG labels is a big step to providing more clarity in the space and we will be looking to incorporate the labels into our fund offers on the platform. GrowthInvest has its own ESG/Sustainability policy and we are currently finalising a strategic partnership with a not-for-profits charity which manages a portfolio of projects tackling climate change and regenerating the biosphere. We believe it is important we all take the right steps to combat the biggest risk the planet currently faces and through this strategic partnership we believe we can help play our part, and help encourage others to do so as well.

For all the very latest on any open offers, amounts raised, deadline dates and the latest news, views, research and videos, please visit us at [GrowthInvest.com](https://www.growthinvest.com), email us on [clientservices@growthinvest.com](mailto:clientservices@growthinvest.com), or give our team a call on 0300 303 0037. You can also [subscribe to](#) our weekly newsletter the [Market Download](#).