

Panel Advisory Solutions

Our Panel Advisory Services are for those who require advice, and customisation to meet investment or compliance needs. As an advisory client, the services we provide to you go far beyond our standard research subscriptions. We are authorised and regulated by the FCA. Our services include:

	Advice, guidance and/or panel reviews
	Product selection
	Advice on exceptions
	Involvement in internal investment committees
	Regular panel rationale documentation
	Direct access to analysts
	Customised scoring and rankings
	Additional AdvantageIQ system tools and features
	“Deep dive” research and due diligence, where required
	Prioritisation of product review scheduling
	Advanced sector reports and market insights

We offer a wide range of tools and services to provide you with personalised panel solutions, priced to meet your criteria.

Examples of Panel Advisory Solutions

PANEL CONSTRUCTION FOR VCT, EIS/SEIS, BRIHT & AIM IHT

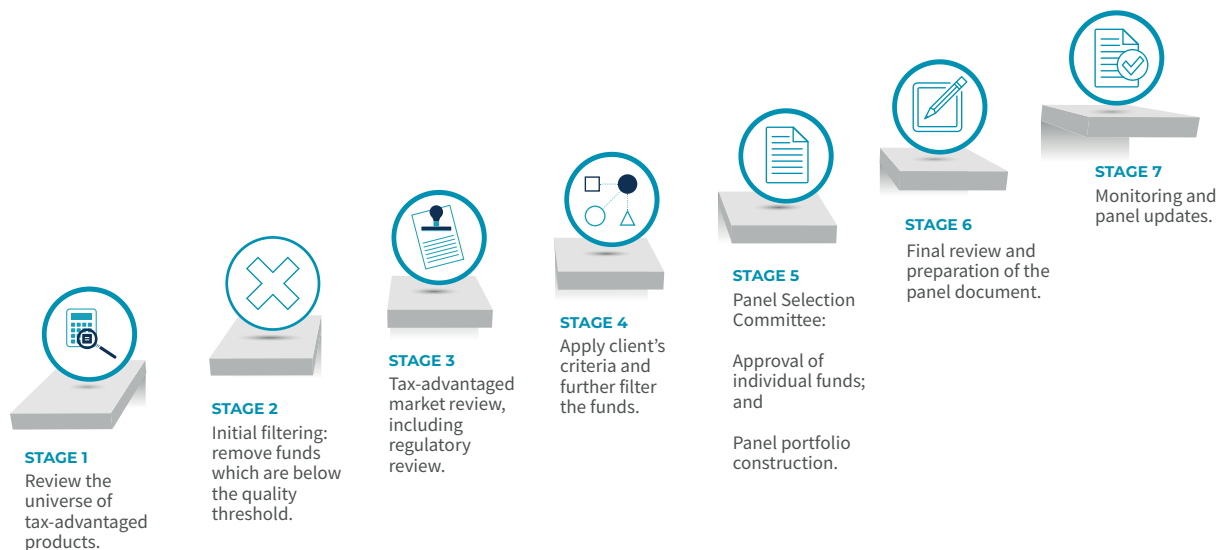
A solution for those who want advice and guidance in the preparation, creation and maintenance of a panel(s) of tax-advantaged investment products. All panel construction solutions typically include the following features:

- ✓ In-person kick-off meeting and annual review meetings
- ✓ Assistance with creation of panel criteria and approvals
- ✓ Personalised panel selection documentation, including fully audited recommendations
- ✓ Dedicated analyst and point of contact
- ✓ Access to AdvantageIQ including:
 - ◇ Advisory-only features and tools
 - ◇ Panel dashboard interface including comparisons and construction tools
 - ◇ More detailed and enhanced ranking tools
 - ◇ Links to enable direct communication with managers
 - ◇ Key information product and manager summaries
 - ◇ Customisable IQ interface including advanced data options
- ✓ Electronic and personal monitoring of panel constituents
- ✓ Enhanced news, market insights and sector/strategy research

PANEL CONSTRUCTION FOR VCT, EIS/SEIS, BR IHT & AIM IHT / CONTINUED

Our approach to panel solutions and recommendations is based on our structured process and governance oversight to ensure that we provide the institutional calibre service to our advisory clients, which is both independent and reliable.

Panel Selection Process



Other Services

PANEL AUDIT LEVEL 1 (PRODUCT AUDITING)

The Panel Auditing Service (Level 1) is designed for those clients who have already created a panel of tax-advantaged investment products themselves. We will review your panel selection against your internal criteria and provide an audit, which will include the following considerations:

- ✓ Ensuring your panel selection meets your existing criteria
- ✓ Highlighting any red flags or concerns regarding the panel constituents
- ✓ Monitoring suggestions of your panel
- ✓ Recommendations for removals and possible additions to your panel selection
- ✓ Panel audit report

PANEL AUDIT LEVEL 2 (GOVERNANCE ADVISORY SERVICES)

As part of this service, we will review the governance procedures of your tax-advantaged investment process, including due diligence and selection, as well as the data collection practices that lead to your particular panel selection. Alongside the review of internal processes, the audit will take into account issues such as fundamental selection criteria and approval processes, investment committee, exception protocols, compliance papers and monitoring procedures.

Panel Audit Level 2 is available only in conjunction with Panel Audit Level 1.

Other Services

OTHER, NON-ADVISORY SERVICES INCLUDE THE FOLLOWING:

- ✓ Governance solutions - integrated compliance questionnaires
- ✓ VCT Portfolio monitoring and valuation services
- ✓ Analyst consultancy & bespoke projects
- ✓ Customised panel tool
- ✓ Bespoke data collection
- ✓ Training, including adviser days and roadshows
- ✓ Personalised research and projects
- ✓ Attending governance/investment committee meetings
- ✓ Custom IQ development
- ✓ White-labelling/licensing of IQ system
- ✓ Training

To subscribe please visit advantageIQ.co.uk

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