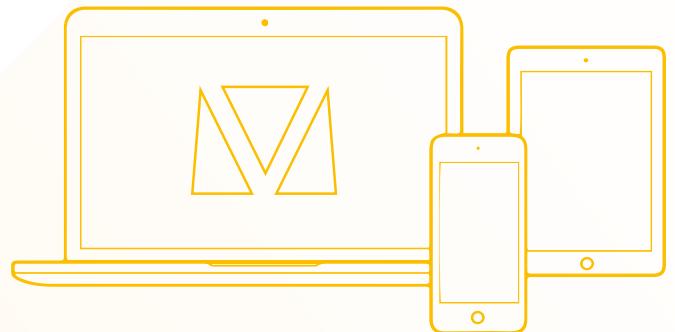


The go-to place  
when advising on  
tax-advantaged  
investments



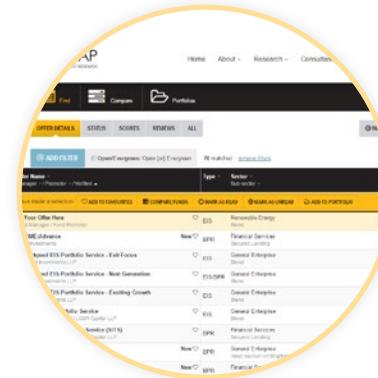
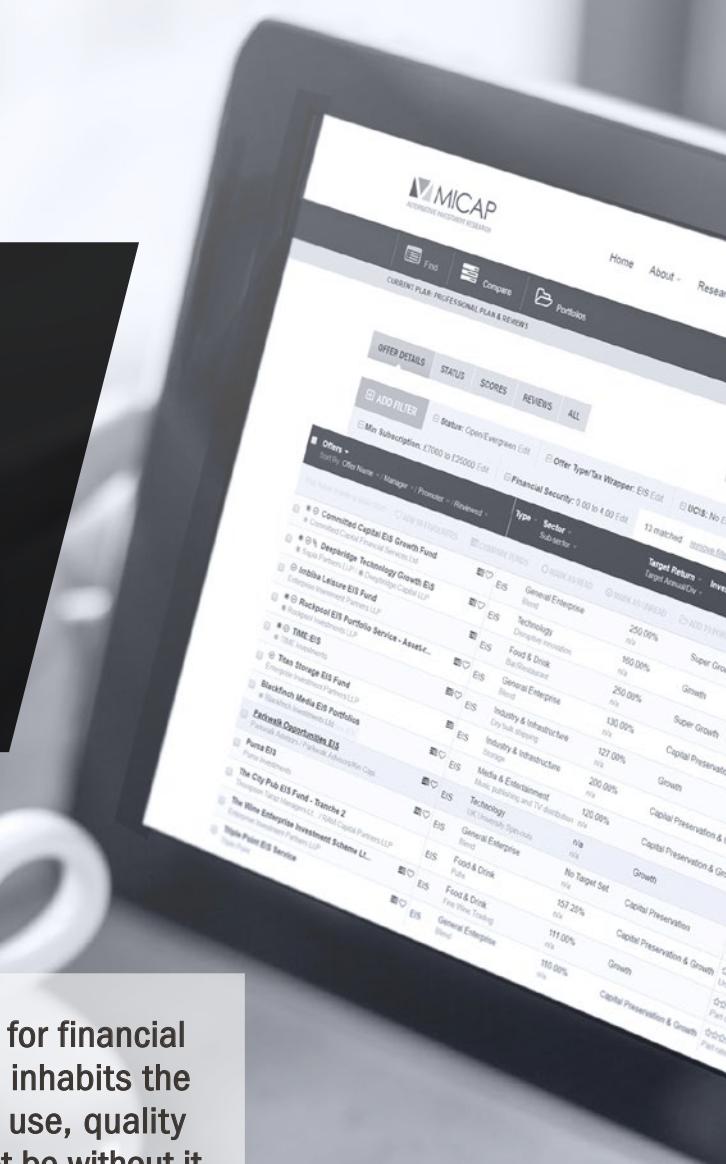
# SAVE TIME & RESOURCES

Search, filter, and compare hundreds of EIS, SEIS, VCT, BR & Sitr offers



Having reviewed the various research aids for financial advisory businesses, I find the MICAP tool inhabits the sweet spot between functionality, ease of use, quality information and resource – and we would not be without it as part of our research process for alternative investments.”

DAVID BASHFORTH FPFS, Chartered Financial Planner, Belmayne Independent Chartered Financial Planners LLP



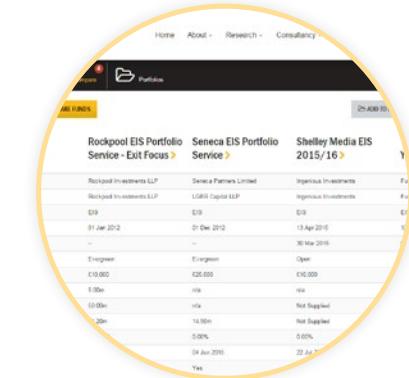
Search

through hundreds of EIS, SEIS, VCT, BR & Sitr offers



Filter

your search with dozens of client specific filters



Compare

multiple investments side-by-side to help you select

The **MICAP Fund Finder** allows you to search, filter and compare hundreds of offers side-by-side, making researching the market and conducting your due diligence a quick and hassle-free experience.

# ADVISE WITH CONFIDENCE

Access our detailed listings, investment scores and reviews



Having recently subscribed to MICAP, we have found that their comprehensive research, in-depth analysis reports, user friendly tools and continual updates on information to be first-rate. Using MICAP has significantly advanced our processes and efficiency in this area of advice for the benefit of our clients.”

ROSS CAMERON APFS, HFS Milbourne

The MICAP Fund Finder lists over **75 factual data points** on each investment, helping you to select objectively and advise with confidence.

Each investment is also rated using our proprietary **Impact Scores**, which objectively examine the key aspects that we feel are crucial when considering an investment, including its diversification, exit strategy, liquidity and any HMRC considerations.

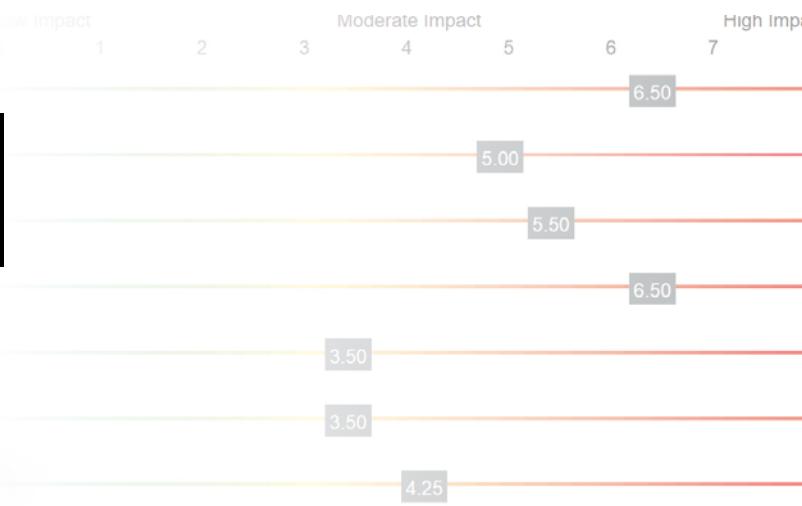
MICAP's Impact Scores are based on a completely objective assessment of a Manager's responses to our Impact Assessment Questionnaire. For example, for BR offers, our Impact Scores are based on 83 separate questions sent to each Manager.



As well as the latest investment documents, you can download our independent reviews on the investments, managers and promoters. MICAP Reviews are designed to help you get a detailed and balanced view, so you can better understand the highlights and considerations of each investment.

**75+** DATA POINTS

**8** CRITERIA SCORED



# ADD VALUE TO CLIENT MEETINGS

Create bespoke sample portfolios and illustrate different investment strategies



I have just started using the MICAP Fund Finder and I have already come across a couple of substantial cases that will benefit from the portfolio building tools it incorporates. As a step forward in the depth and quality of advice to clients in these markets, it is unparalleled.”

**GRAEME BONE**

Director, Beaufort Asset Management Ltd



Create **unlimited sample portfolios** of investments and present different options for your clients.

The MICAP Portfolio Builder illustrates and analyses your portfolios by sector, investment objective, number of investee companies and more.

Our portfolio timeline even shows when your clients can expect a return on their investments and any potential tax reliefs. Perfect for client meetings.



# STAY COMPLIANT

Record your research for a clear audit trail



MICAP is an important part of the selection process for the alternative investments market. Without reference to MICAP an adviser may have gaps in their analysis which may lead to a poor decision for their client and leave them open to unwelcome scrutiny by the regulator.”

GIANNI CAMPOPIANO, Principal, Foundation FP

To help you evidence your research, MICAP automatically creates a **time-stamped record** of all activity on your account.

This includes all investments viewed, filters applied, comparisons made, portfolios created, as well as investment documents or reviews downloaded.



Activity Log

Through the **Activity Log**, all user-related activity on your account can be saved to individual client folders, and a complete record is stored.

At the click of a button you can also:



**Write client and investment notes**

Build your client file as you go and make client and investment notes on the Fund Finder, to record each step of your advice process.



**Save your filters and comparisons**

Access your saved filters to quickly update your searches and check if any new offers meet these requirements.



**Print your research and portfolios**

Saved research is date and time stamped and can include both your name and your client's name for a clear audit trail of your recommendations.

# REDUCE RISK

And stay up-to-date with our Panel Support Services



We use MICAP's expertise to supplement our own procedures when choosing appropriate products in the alternative investment space. Working together, we use their data analysis of all of the products to form a set of minimum criteria that we expect products to meet if they are to be recommended to our clients. The MICAP Fund Finder then makes it easy for our advisers to access the agreed panel and all the supplementary due diligence documents."

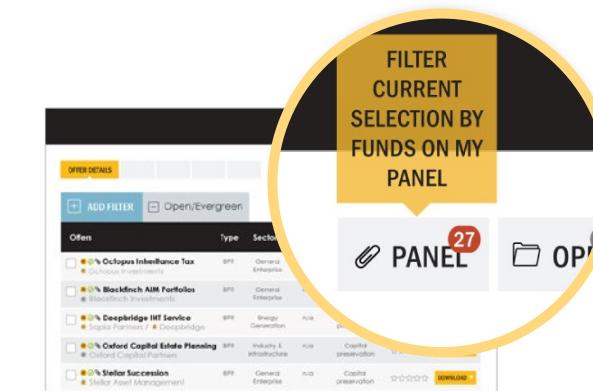
**MICHAEL CHAPLIN-KELLY**, Group Support Manager, Fairstone

**MICAP's Panel Support Services** are designed to help you reduce risk when advising on tax-advantaged investments - by helping you to define and implement a recommended or centrally researched list of tax-advantaged investments (panel).

We work closely with financial advisory firms and wealth managers of all sizes to define and screen the market against their own specific criteria.

We can then monitor the market to help ensure that your panel is based on the latest open offers and the most up-to-date data.

Our processes are well-defined and fully auditable, and the resulting panel can be easily communicated to your advisers via the MICAP Fund Finder.



MICAP can offer a number of bespoke solutions, to suit your firm's needs. For more information on our Panel Support Services please contact [info@micap.com](mailto:info@micap.com)

# TRUSTED BY ADVISERS

For our research and compliance tools



MICAP offers our members a robust research solution when advising on tax-advantaged investments.”

PHIL CARROLL

Proposition Director - Wealth Intrinsic Financial Services

With over **5,500 users**, MICAP is trusted by advisory firms of all sizes, from sole traders to national IFAs and networks.

This includes wealth managers, accountants, solicitors, family offices and private banks, all of which use MICAP for their ongoing due diligence on tax-advantaged investments.

MICAP is also used by investment managers and promoters operating in this sector, to help them stay up-to-date on the market.

As trusted by



KILLIK & Co



Quilter  
Financial Planning



# AHEAD OF THE GAME

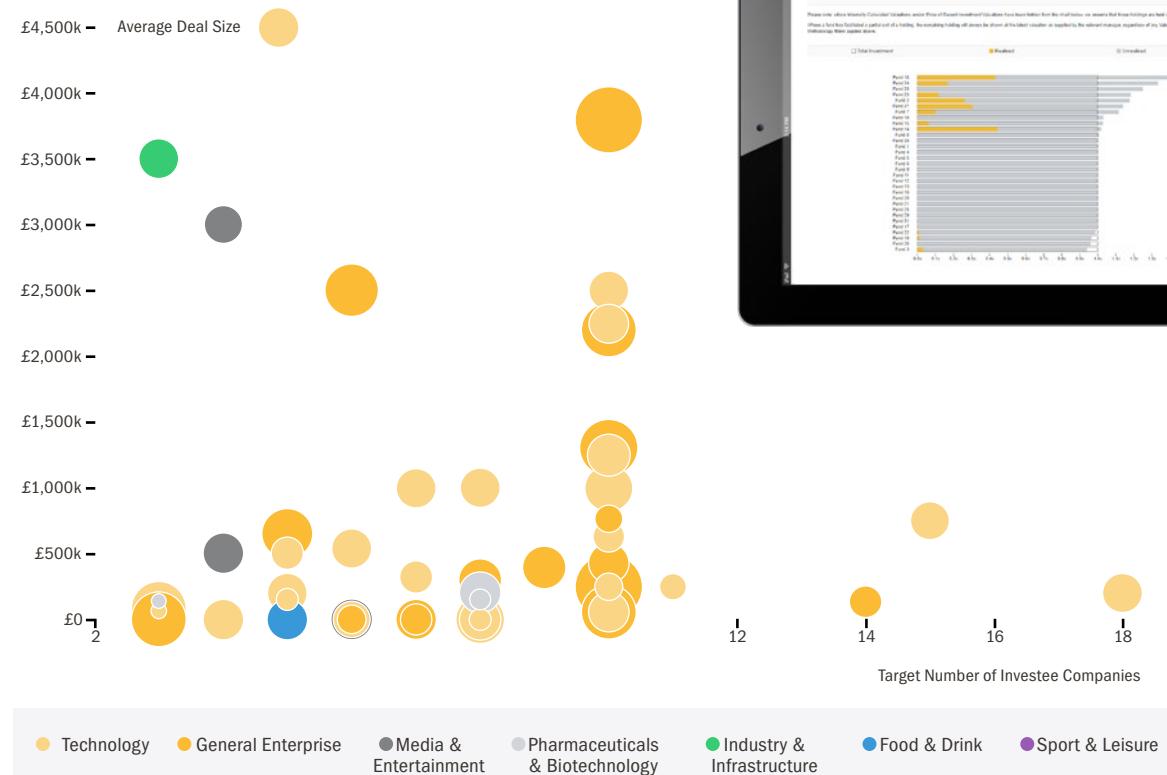
Our innovative approach is moving the market forward



Verified and quantifiable performance information has long been the holy grail for the EIS/SEIS industry... This is a significant leap forward for our industry and we believe a welcome one for planners and advisers."

**MARK BROWNRIDGE**  
 Director General,  
 The Enterprise Investment  
 Scheme Association

Our innovative **Market Snapshots** and **Performance Charts** have been built to allow advisers & paraplanners to quickly understand and compare all open funds, and represent a real step change for the tax-advantaged market.



MICAP is the go-to place for advisers  
considering tax-advantaged investments

Find out more at [www.micap.com](http://www.micap.com)