

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



### SAVE TIME & RESOURCES

Search, filter, and compare hundreds of EIS, SEIS, VCT, BPR & SITR offers





through hundreds of EIS, SEIS, VCT, BPR & 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.

| OFFER DETAILS                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          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| ISA Cualifying<br>Impact Scores                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Horne<br>Part Purchano<br>Reckpool EIS Portfoll<br>Service - 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| ISA Cualifying<br>Impact Scores                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Home<br>Perform<br>Reckpool EIS Portfoll<br>Service - 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### ADVISE WITH CONFIDENCE

Access our detailed listings and investment scores

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, the level of asset backing and any HMRC considerations.



### **EIGHT** KEY ASPECTS

#### AND IS SCORED AGAINST

#### DATA POINTS

## 75+

#### EACH INVESTMENT LISTING HAS





### ADD VALUE TO CLIENT MEETINGS

Create bespoke sample portfolios and illustrate different investment strategies

### 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 you can expect a return on your investment and any potential tax reliefs. Perfect for client meetings.

#### 

I've printed off a number of portfolios for my clients and I find that it really helps them visualise their options.

#### DAVID STAMP

Owner INDEPENDENT FINANCIAL SOLUTIONS





| Partholio Summary                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      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