

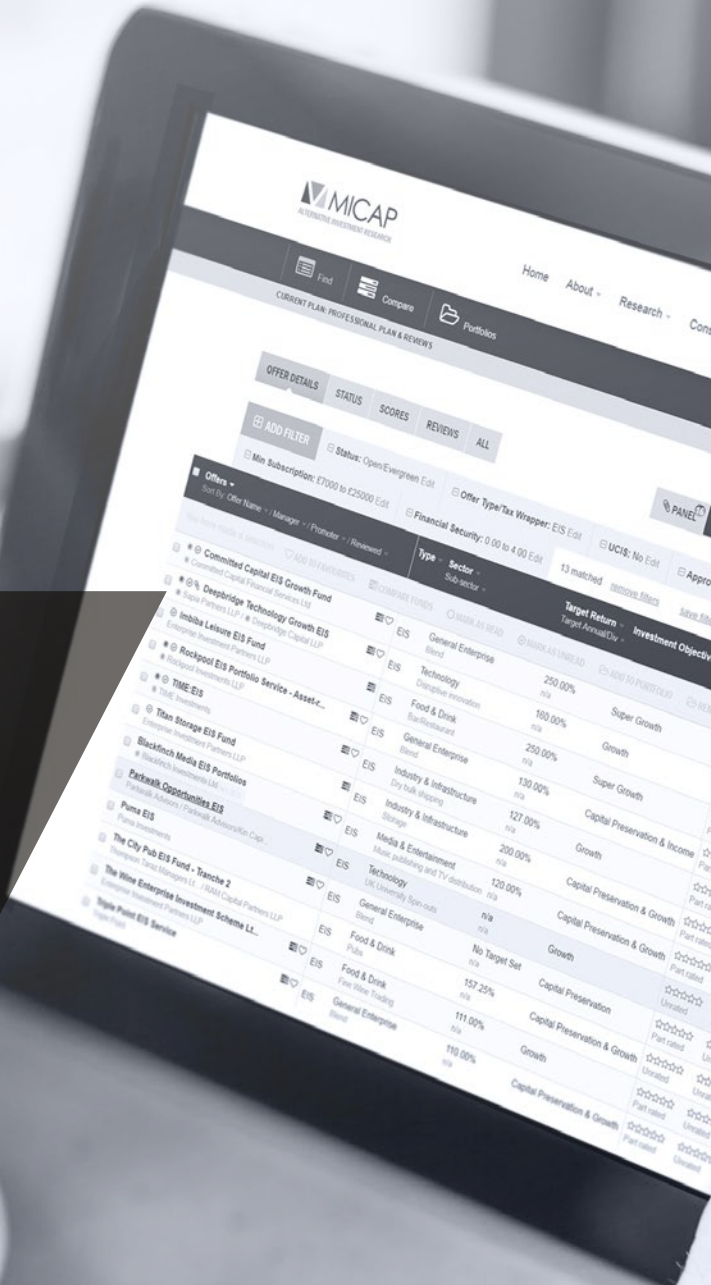
The **go-to place** when advising on  
**tax-advantaged investments**



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# SAVE TIME & RESOURCES

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



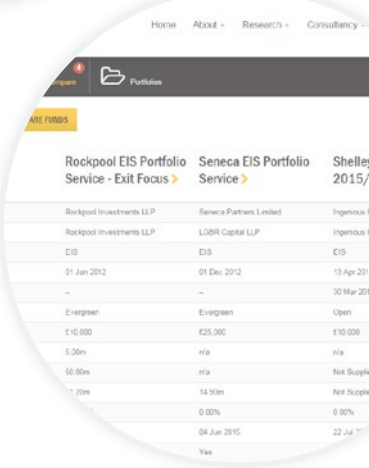
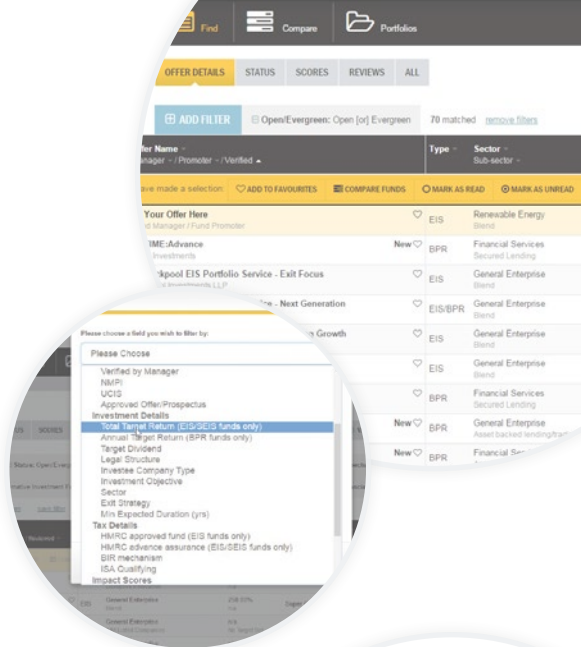
**Search**  
through hundreds of EIS, SEIS, VCT, BPR & Sitr offers



**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.

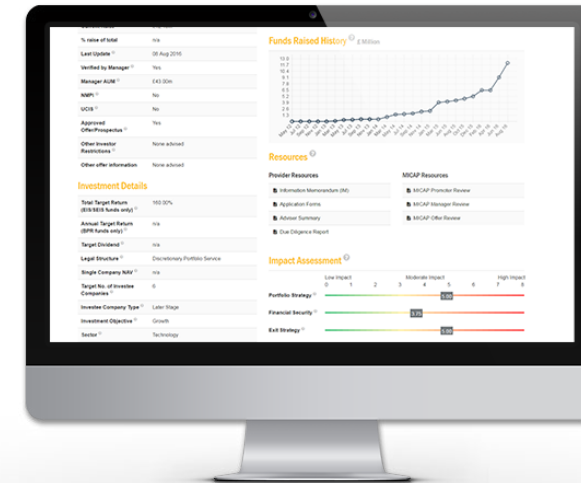
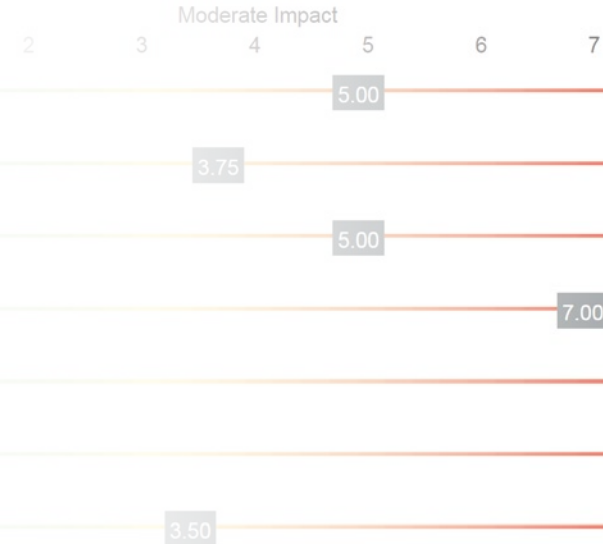
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# ADVISE WITH CONFIDENCE

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.



EACH INVESTMENT LISTING HAS

# 75+

DATA POINTS

AND IS SCORED AGAINST

# EIGHT

KEY ASPECTS

3

# 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



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## STAY COMPLIANT

Record your research for a clear audit trail

At the click of a button you can:



### Write client and investment notes

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



### Save your filters and comparisons

Access your saved filters to quickly update your search 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 and your client's name for a clear audit trail of your recommendations.

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## TRUSTED BY ADVISERS

For our independent reviews and panel selection

MICAP is trusted by advisory firms of all sizes, including wealth managers, accountants, solicitors, family offices and private banks.

MICAP is also used by national IFAs and networks for their ongoing due diligence and panel selection.

Our experienced analysts can help you devise your investment panel and ensure it remains relevant and up to date. You can even create and centrally manage your panel within the Fund Finder to ensure that your advisers are always aware of your allowable investments.



As well as the latest investment documents, you can also download our detailed **independent reviews** on the investments, managers and promoters to help you and your clients fully understand their highlights and considerations.



*I have adopted MICAP as my preferred provider of alternative investment research, and it has proved very cost-effective and time-efficient.*



TREVOR SMITH APFS  
Chartered Financial Planner  
CLARENDON FINANCIAL PLANNING

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## A COMPLETE SOLUTION

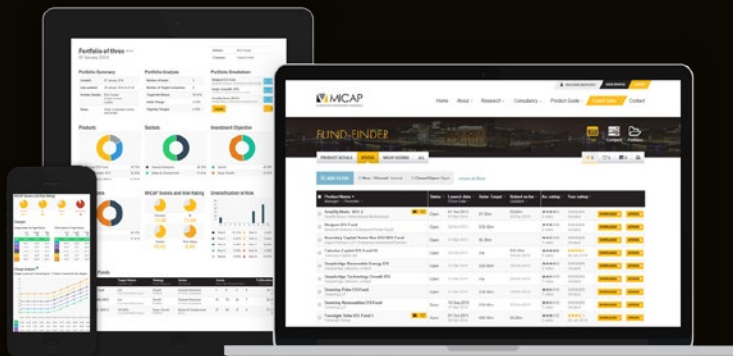
Everything you need to advise on tax-advantaged investments

**We've done all the hard work, so you don't have to.**

- ✓ Save time & resources
- ✓ Advise with confidence
- ✓ Add value to client meetings
- ✓ Stay compliant
- ✓ Trusted by advisers

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**MICAP is a provider of quality independent due diligence and research on tax-advantaged investments.**

MICAP also provides an innovative and user-friendly online tool for advisers looking to **search, compare** and **build portfolios** of VCT, SITR, EIS, SEIS and BPR investments.

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

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