

Kuber

The Service Solution for Advising on EIS/VCT/BR

Kuber offers a service and platform proposition to select, facilitate, monitor and report on tax-efficient investments across multiple managers and investments in this high risk* and high admin investment space.

Kuber works with financial advisory firms in the tax efficient investment space to:

- Enable them to **offer a superior service to their clients;**
- Enable them to **give best advice and meet regulatory requirements;**
- **Save them time and money** on applications and administration; and
- **De-risk their own advice business.**



Kuber platform

Diversification:

Kuber offers investment opportunities which mitigate a degree of the risk for investors in this high risk investment space, providing access to investment across multiple managers, each offering a diversified portfolio of underlying investments spread over a range of sectors.

Ongoing monitoring and reporting:

Initial and ongoing due diligence is conducted by the Kuber Investment Committee, offering an industry opinion in addition to transactional data for client reviews. This is available on an ongoing basis and can be tiered to meet different adviser and investor requirements.

Due diligence:

Managers onboarded to the Kuber platform undergo initial and ongoing due diligence conducted by Kuber's Investment Committee, with support from Dr Brian Moretta, Hardman & Co. This provides an additional layer of due diligence.

One digital application:

Kuber provides advisers and investors with a digital solution to access investment across multiple managers in one place.

Access to a full product range:

The Kuber platform facilitates investment across a range of tax-efficient products (EIS, SEIS, BR, VCT's) in one place.

Industry leading Investment Committee:

James Ramsay, Managing Director, Kuber/TEPS (Tax Efficient Procurement Services)

James has over 15 years' experience in the market, founding TEPS in 2016 and joining Kuber in December 2019, focusing on reporting on products across the whole of the tax efficient market.

David Moss, Corporate Finance Lawyer, Kuber

David has over 25 years' experience as a corporate finance lawyer, working on numerous M&A and other capital market transactions.

Agata Molinska, Product Manager, Kuber

Agata heads up Kuber's Product team. Agata's knowledge and analysis of the Managers' investment processes and service proposition, as well as ensuring appropriate corporate governance, makes her an invaluable representative on the Investment Committee.

Brian Moretta, Head of Tax-Enhanced Research, Hardman & Co

Brian's career in Financial Services has spanned over 20 years, including over more than a decade as a fund manager.

The Kuber Recommendation Service Investment Committee has an additional two representatives:

Mark Brownridge, Director General, EISA (EIS Association)

Luke Barnett, Lead Analyst of Tax-Advantage Investment research team, **MJ Hudson Allenbridge**

*** RISK WARNING** The information contained in this brochure is for discussion purposes only for professional advisers, their clients and high net worth individuals. It is not for Retail Clients. EIS, SEIS, VCT and BR qualifying portfolios are not suitable for all investors as the underlying investments are often illiquid and therefore high risk. Advice should always be sought from a professional adviser prior to investing.

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