Book-Building VCT Applications with GrowthInvest

Introduction

GrowthInvest allows advisers to get ahead of popular VCT launches by providing access to offer information as soon as a prospectus is released. With offer pages available ahead of launch, advisers can discuss opportunities with clients, produce fee illustrations and begin book-building applications in advance.

For offers listed as coming soon or expected to be in high demand, book-building applications and funding client accounts ahead of launch can help ensure applications are ready for submission as soon as the offer opens. Combined with GrowthInvest's automatic application functionality, this helps create a smoother and more efficient investment journey for both advisers and their clients.

How it works

1. **Create a shortlist for each client -** Head to the platform and create a shortlist for each client ahead of the VCT launch date.

2. **Confirm your shortlisted applications -** GrowthInvest will be in contact approximately one week before the go-live to confirm that you are happy to proceed with the applications and amounts outlined on your shortlists.

3. **Applications are sent automatically on launch day -** For advisers who have confirmed they wish to proceed, application forms will automatically be sent for signature. As part of the usual process, forms will be sent first to the adviser and then to the client via DocuSign.

4. **Applications are submitted directly** - As applications are signed, GrowthInvest will notify the receiving agent and/or provider, then client funds will be transferred in line with the agreed application process.

   Please note that client funds should be transferred to their GrowthInvest account before the launch date, in order to be processed with the signed application form to complete the investment. The correct James Brearley bank details and client-specific references can be found on the platform in the Bank Details tab of their Client Profile, but can be provided per client upon request.

5. **Receive ongoing updates** - Updates on the investment will be available via the Proposals Kanban, available on the platform, and where users have opted in, platform notifications will alert you when certain events are completed.

As a reminder, our Knowledge Centre contains helpful guides and video walkthroughs, including:

- Making Investments - Creating and Using Shortlists
- Getting Started - Setting Up a Client

Please note that any new client intending to invest must have a signed GrowthInvest Account Application Form completed at least 48 hours before applications can be submitted.

If you have any questions or would like to arrange a call to discuss this process further, please reach out to our **Client Services team** via clientservices@growthinvest.com.

GrowthInvest factsheet

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