



WEALTHTECH100

Profiles of the **WEALTHTECH100**, the world's most innovative WealthTech companies that every leader in the investment industry needs to know about in 2026





Book a demo today:
Telephone 0300 303 0037
enquiries@growthinvest.com

the
**Alternative
Investment
Platform**

At GrowthInvest, we make tax-efficient and private investments more accessible to wealth managers, financial advisers, and their high value clients.

We provide tailored digital solutions enabling efficient execution and ongoing administration of private asset portfolios, alongside the ability to onboard existing assets. We give you a single clear view of all of your client's alternative investments.

EFFICIENCY | CONTROL | SCALE

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The **WEALTHTECH100** is an annual list of 100 of the world's most innovative WealthTech companies selected by a panel of industry experts and analysts. These are the companies every leader in wealth and asset management, private banking and financial advisory needs to know about as they consider and develop their digital transformation strategies and new customer propositions.

There's plenty of interest and hype about WealthTech in the marketplace, but much of it is superficial, incoherent or self-serving and fails the needs of decision-makers in incumbent financial institutions who require independent, facts, figures and analysis.

The **WEALTHTECH100** list will help senior management and investment professionals evaluate which digital wealth management and financial advisory models have market potential and are most likely to succeed and have a lasting impact on the industry.

CRITERIA

The criteria assessed by the Advisory Board and FinTech Global team include the following:

- Industry significance of the problem being solved
- Growth, in terms of capital raised, revenue, customer traction
- Innovation of technology solution
- Potential cost savings, efficiency improvement, impact on the value chain and/or revenue enhancements generated for clients
- How important is for executives in asset management, private banking and financial advisory to know about this company?

PROCESS



RESEARCH WEALTHTECH UNIVERSE

Analyse universe of WealthTech solution providers on FinTech Global database and external sources



NOMINATE COMPANIES

Shortlist candidates that meet criteria along with companies nominated via the website



CONDUCT INTERVIEWS & SURVEY

Undertake in-depth interviews or surveys with founders and CEOs of shortlisted companies



IDENTIFY WEALTHTECH 100

Determine which companies excel in terms of the criteria and can be classified as WealthTech innovation leaders



PUBLISH

Announce results to media and finalists



COMPANY RESEARCH PROFILE



Founded 2012
 London, England
www.growthinvest.com
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Employees: 11-50
 Regions of operation: United Kingdom

KEY EMPLOYEES:



Daniel Rodwell
CEO



David Lovell
COO



Martin Cosgrove
CIO



Aled Treharne
CTO

Subsectors: **Portfolio Management & Reporting, Investing Tools, Financial Planning, Alternative Investment Solutions, Data & Analytics, Financial Services Software**

OFFERING

GrowthInvest is a fast-growing UK based adviser platform, specialising in UK tax efficient and global Private Market investments. As the only true whole-of-market investment platform for the tax efficient and alternative sectors, GrowthInvest provides advisers and wealth managers with transparency, efficiency, and control around their alternative advice proposition.

Our technology is built around our specialist knowledge of the alternative investment industry. Our clients benefit from digital investment access to EIS, VCT, IHT alongside global Private Market Funds. Alongside the ability to onboard historic client portfolios, enabling centralised portfolio reporting across all alternative assets.

PROBLEM BEING SOLVED

The GrowthInvest platform is an active solution to make tax-efficient and private market investing more accessible to the UK Private Wealth market.

We believe that alternative asset classes are an essential part of a diversified investment portfolio, and that alternatives, which have been underserved by main market platforms, are becoming increasingly important to advisers, wealth managers and private banks.

We aim to drive increased engagement with alternative and private investments by removing barriers to growth, such as inefficient paper driven administration, lack of transparency around fees and costs, and difficulties in diversifying portfolios.

TECHNOLOGY

Technology is at the heart of the GrowthInvest offering and is the key to achieving our high service levels. Our core platform is built in-house using industry leading frameworks and operating with full resilience and automatic scalability in the cloud. This combination of self-healing resilience and rapid scaling ensures that our platform provides the highest level of service no matter what the demand.

Alongside our core platform is Cascade, our data ingestion and reporting platform. Cascade provides high speed and high-volume data cleansing and transfer coupled with security, resilience and strong provenance.

PRODUCT DESCRIPTION

GrowthInvest delivers all the efficiencies you would expect from an adviser platform, but uniquely services alternative and tax-efficient investment markets. With specialist market-leading technology, GrowthInvest enable advisers and wealth managers to deliver the best of solutions to their clients.

- **Market-Leading Technology:** Smart proprietary technology delivers security, efficiency, and simplicity in this complex marketplace.
- **Superior Service:** The Client Services Team are always ready to provide support and guidance in this complex area of planning, backed by a catalogue of educational guides, webinars and FAQs.
- **Unrivalled Range of Alternative Investment Products:** Uniquely combining both listed and unlisted products on one platform, including EIS, SEIS, VCT, IHT, Private Equity/Credit/Infrastructure and Venture Capital Funds.
- **Complete Set of Product Wrappers:** A full range of relevant investment wrappers including ISA, VCT ISA, SIPP, SSAS, GIA; alongside the ability to treat clients as advised or execution-only.
- **Consolidate & Transfer Existing Portfolios:** GrowthInvest's dedicated onboarding teamwork with clients to reconcile, digitise and onboard their existing alternative Investment portfolio.

TRACTION/GROWTH

- GrowthInvest's Assets under Administration (AUA) have continued to grow rapidly (63% YoY) as a result of continued new client acquisition, alongside increasingly deep, integrated relationships with some of the UK's largest adviser firms
- The company's software is used by over 500 financial advisers and wealth managers, with over 3,000 underlying clients.
- GrowthInvest partners with over 70 fund managers, custodians and registrars, providing access to over 100 different investment offers and reporting on over 3,500 investment products.

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Private markets are entering the mainstream - but is the infrastructure ready?



Private markets and tax-efficient investments are moving steadily into the mainstream of UK wealth management. Advisers are increasingly using them in everyday portfolio construction as clients look for diversification, tax planning and long-term growth.

The shift is happening quickly. The global private-wealth channel is estimated at more than \$450tn, and private-market exposure is becoming increasingly relevant to retail portfolios. Regulatory developments such as ELTIF 2.0 and the UK's Long-Term Asset Fund are accelerating access, while evergreen structures are making private-market funds easier for advisers to use.

But infrastructure has not kept pace. Much of the wealth-management technology stack was built for listed assets and simpler portfolios.

"It becomes obvious very quickly how many different parties are involved in a single private-markets transaction," says **Daniel Rodwell**, CEO of GrowthInvest. "What also stands out is how few of those systems speak the same data language. When you work with those disparate datasets every day, you realise how significant the integration gap has become."

Private-market information often arrives in fragments — valuation PDFs, emailed updates from fund managers, and inconsistent transaction records. This leaves advisers piecing together a full picture manually, creating broader operational challenges and limiting firms' ability to deliver a truly personalised client experience

A specialist platform built for a complex market

GrowthInvest was founded to address the operational challenges associated with tax-efficient and alternative investments, building a platform designed from day one around integration and data standardisation for advisers and wealth managers.

"It felt strange to me that no platform was delivering the efficiencies mainstream systems offered — but tailored to tax-efficient and private-markets investing," Rodwell recalls. "We kept meeting advisers who were facing exactly the same operational problems. That was the moment GrowthInvest was born."

Under CTO **Aled Treharne**, whose background in telecommunications included high-volume multi-party integration, real-time resilience and large-scale systems reliability, the company rebuilt its technology architecture from the ground up. The resulting platform ingests, normalises, reconciles and distributes private-market data across advisers' core systems.

A key step came through GrowthInvest's work integrating with multiple adviser back-office systems — supported by data-hub technology such as Sprint Enterprise's FINIO, and through direct integrations with leading platforms including Intelliflo Office, Xplan (Iress) and other major ecosystem providers. For the first time, advisers can manage and report on alternative and tax-efficient investments within their existing systems, receiving standardised portfolio data without manual intervention.

"Access to standardised and accurate portfolio data across private-market and tax-efficient assets has long been a problem for advisers," Rodwell notes. "This is a landmark moment because it finally brings these assets into advisers' core systems."

These integrations cover VCTs, EIS, SEIS, BPR/IHT services and a growing range of private-market funds including private equity, venture capital, private credit and infrastructure. At its core, GrowthInvest acts as a data and information consolidator for one of the industry's most complex asset classes.

Infrastructure as a competitive advantage

The private-markets landscape is entering a period of transformation. Evergreen structures are broadening access, global managers are seeking credible distribution partners, and advisers are increasingly relying on alternatives for diversification and tax planning. However, unlocking this next wave will require infrastructure to catch up.

Consolidation across adviser groups means firms now hold thousands of historic private-market positions, often spread across legacy systems. GrowthInvest's technology — combined with its analyst and consultancy teams — is now being used to standardise these portfolios, deliver clarity for Consumer Duty, and provide a single view across entire networks.

"We are now delivering transparency, value and insight on previously disparate portfolios within days," Rodwell says. "That simply was not possible even two years ago."

As WealthTech competition intensifies, success will depend less on product breadth and more on infrastructure: clean data, deep integrations and efficient adviser workflows. As private markets scale in UK wealth management, GrowthInvest is positioning itself as the partner that can fix the plumbing and bring structure to a complex asset class. Private markets expose the weaknesses of legacy architecture and reward platforms that can bring structure to one of the industry's most complex asset classes ●



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INVEST**

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INTERESTING FACT
On average, total client assets are >15% higher than first estimated by the wealth management firm.

the Case Study

the Client

- Rated as one of the UK's Top 25 financial adviser firms*
- >400 clients using EIS, VCT, IHT, Private Equity and Private Credit
- >£75m in historical investments, executing £11m per annum
- Using GrowthInvest as an integrated solution for all Tax Efficient & Alternative Investments since 2022

our Solution

- Corporate-branded client portal
- Fully digital client and investment application process
- Access, research and invest in over 100 tax efficient or private market products
- Maintain the firm's panel of approved investments for their clients (including single company EIS Investments)
- Provide a consolidated view of all clients and their holdings with comprehensive reporting, including full transactional level data, and integrations via API with 3rd party systems
- Centralised document portal holding all documentation including HMRC forms
- Dedicated account management team
- Standard platform fee model and facilitated adviser fees

client Problem

- Disparate sources for research, execution and reporting
- Client portfolios were recorded on spreadsheets with tax forms held in paper files
- No centralised post-investment support & documentation
- Heavy reliance on multiple in-house administrative staff
- No integration with existing back office systems



the Extras

- Bespoke solutions delivered for this client
- Enhanced client portfolio analysis tools
 - Enhanced trade lifecycle visibility
 - Co-branded user guides & support collateral

INTERESTING FACT
Many clients found dividend payments that they had not received, or identified investments upon which they had not claimed tax relief

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* The firm was part of FT Adviser Top 100 2022 (see <https://2022top100.ftadviser.com/>)



For more information contact info@fintech.global

