FOCUS

TriplePoint

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Introduction

Triple Point is a purpose-driven investment manager that invests in assets that make a difference.

Our philosophy is simple. Big problems create strong demand. Strong demand drives good investments. And good investments solve big problems.

Since 2004, we've applied our unique blend of traditional funding and progressive thinking to unlock opportunities ripe for investment. Because you shouldn't have to choose between making great returns or making social impact – you achieve one by achieving the other.

We offer a range of solutions and investment strategies that aim to secure excellent returns for our investors while driving positive change in our society.

Our services

Triple Point Estate Planning Service
Our Estate Planning Service helps investors leave a legacy for their loved ones by investing in companies expected to benefit from 100% inheritance tax relief in just two years, all while helping public and private sector organisations to acquire assets, deliver services and support UK growth and employment.

Triple Point Corporate Estate Planning Solution
Our Corporate Estate Planning Solution gives business owners a unique opportunity to participate in the lending and leasing trade through our two specialist trading partnerships. Targeting good risk-adjusted returns and inheritance tax relief, it also helps provide business-critical funding to thousands of SMEs as well as some of the UK's biggest corporations and public sector bodies.

Triple Point Income Service
Our Income Service aims to generate a predictable, attractive fixed rate of return to investors, who can choose an investment horizon from between one and five years. Funds are invested for a fixed period in corporate bonds which are used to provide loans, leases and other asset finance to a large and diverse range of UK companies. Investors can choose to receive income monthly, or on maturity.

These investments are high-risk and may not be suitable for all investors. Tax treatment depends on the individual circumstances of each client and is subject to change. Tax reliefs depend on the investee companies maintaining their qualifying status.

Sector tool

When it comes to Business Relief-qualifying investments, there is a traditional concentration among providers on renewables and infrastructure. This means that even if you diversify across different investment managers, you may have a greater concentration risk than you realise.

Our sector tool allows you to drill down into the underlying asset classes to get a clear view of how diversified a portfolio really is. Visit our adviser centre for more information.

Triple Point Venture Fund VCT
VCTs offer investors access to high growth small businesses, while also benefiting from up to 30% upfront tax relief, tax-free growth and tax-free dividends provided the shares are held for five years. Our VCT focuses on investing into B2B companies that are solving real world challenges. It seeks out the most innovative and dynamic young startups, investing at an early stage to help maximise financial returns to investors.

Triple Point Social Housing REIT plc (SOHO)
Our Social Housing REIT improves the lives of vulnerable people by meeting the demand for specialised supported housing. For socially-minded investors, this presents an opportunity to have a meaningful impact on society at the same time as generating a long-term, inflation-linked income stream from a diverse portfolio of properties.

Triple Point Digital 9 Infrastructure plc (DGI9)
Our Digital 9 Infrastructure offering unites investors, changemakers and policymakers to drive a sea-change in global connectivity. The global demand for improved speed, reliability and accessibility of data is driving exponential growth in the vast digital infrastructure market. The fund targets a 10% total shareholder return, and investors can also help accelerate economic growth, social development, and critical climate action.

Triple Point Energy Transition plc (TENT)
Our Energy Transition offering supports the transition to net zero by investing across the energy sector while targeting a diversified and sustainable income for investors. It focuses on three key areas: low carbon generation, energy transmission and storage, and onsite supply and demand reduction, that support the transition towards a lower carbon, more resilient and efficient energy system.

Key information

Product	Income	Growth	Upfront income tax relief	IHT relief	CGT free growth	Available in an ISA?	Available in a SIPP?
TPEPS	✔	✔	✘	✔	✘	✘	✘
TP VCT	✔	✔	✔	✘	✔	✘	✘
Income Service	✔	✘	✘	✘	✘	✔	✔
TENT	✔	✔	✘	✘	✘	✔	✔
SOHO	✔	✔	✘	✘	✘	✔	✔
DGI9	✔	✔	✘	✘	✘	✔	✔

Planning scenarios tax efficient investments can help with

Business relief	VCTs	Corporate Estate Planning Service	Income Service
Clients looking for a two year IHT solution	As part of a diversified portfolio	Investing surplus cash	Investing surplus cash in a business
Clients looking to plan for IHT whilst retaining access and control	Clients looking at alternatives to pension planning	Regaining trading status for a business	Clients who have an investment horizon of 1-5 years
IHT planning with a Power of Attorney	Offsetting tax on rental income	Establishing a private trading company	Access to uncorrelated assets
BR-qualifying businesses sold in the last three years	Extracting profits from a business tax efficiently	Converting a property or investment company into a trading company	Clients seeking a yield
Clients looking to settle assets into discretionary trust tax efficiently	Selling a bond pregnant with gain		Clients considering alternative investments
IPDI trusts	Offsetting tax on pension income		Clients looking to diversify their ISA investments

How we can help you

We aim to make investing with us as straightforward as possible. We offer financial advisers a range of tools and support to help make your life easier, including CPD-accredited tax planning webinars, digital tools and examples of how to write the best suitability reports for your clients.

Contact us

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Important information

As with all investments investors capital is at risk. There is no guarantee that target returns will be achieved, and investors may get back less than they invested. This financial promotion has been issued by Triple Point Group which is authorised and regulated by the Financial Conduct Authority. This includes Triple Point Investment Management LLP no. 456597, and Triple Point Administration LLP no. 618187.