

CPD

Certificate of Knowledge & Understanding

Intelligent Partnership certifies that

Jake Hatch

Has achieved 4 hours of CPD by completing

EIS & SEIS Accreditation

Issued: 2026-02-27

Expires: 2027-02-27

Certificate ID: cn0vbdojyr

Learning Objectives

- List and explain the criteria that govern whether a company and its proposed share issue qualifies for the EIS and/or SEIS reliefs
- List and explain the rules that investors in EIS and/or SEIS qualifying shares must adhere to if they are to receive and maintain the full benefits of the reliefs available
- Define some of the key risks associated with EIS and SEIS
- Explain how Income Tax Relief, EIS CGT Deferral Relief, IHT Relief, Tax Free Growth and Loss Relief affect the income gained from EIS investments
- Explain how Income Tax Relief, SEIS CGT Reinvestment Relief, IHT Relief, Tax Free Growth and Loss Relief affect the income gained from SEIS investments
- Explain what aspects you would take into consideration when assessing a client's suitability for EIS or SEIS investments and define how you would conduct research and due diligence on providers
- Detail the differences between the rules applicable to EIS and those applicable to SEIS

