

Triple Point Investment Management



Shipshape speaks to Michael Bayer at tax-efficient capital specialist Triple Point about bringing together tax, structured finance and investment expertise for its clients.

Triple Point Investment Management LLP is a specialist investment boutique offering a number of tax-enhanced investments. As well as managing a range of Venture Capital Trusts, the firm also offers investors a number of investment products that qualify for the tax reliefs associated with Enterprise Investment Schemes, and Business Property Relief which can mitigate inheritance tax.

from across a range of well established investment disciplines,” says Michael.

Triple Point’s products are typically used by professional advisers, private banks and asset managers to enable their clients – private individuals, trusts and corporates – to access tax-saving opportunities without the downsides, such as long lock-ins or poor deals, that would often accompany them. The business is

Finding solutions

Investors are experiencing a number of issues in the current climate. There is a shortage of sensible investment opportunities that provide good returns, coupled with security and liquidity. This is exacerbated by the current level of bank base rates. Many investors are also concerned by the increasing levels of tax. Triple Point has specifically designed products to address these problems.

“We have known and worked with Shipleys over several years,” says Michael. “For example, we have called on their VAT expertise for a number of recent projects. Shipleys has always provided high quality advice and represents excellent value.”

“ We are... benefiting from the current environment where we have substantial funding available, at a time when banks and other institutions are turning away great financing propositions.

Triple Point was originally founded in 2004 to bring together expertise from three core disciplines: tax, structured finance and investment.

“Our unique approach provides wealthy investors with access to investments that deliver capital security and liquidity, together with tax-enhanced returns,” says principal Michael Bayer. “We stand out because of the high quality and breadth of experience of our senior team.”

Product innovation

The firm has developed innovative aspects to its products in order to achieve specific objectives for its clients, centred on low investment volatility, capital security and liquidity. “We have also developed a high quality investment origination and execution process which applies best practice

about finding sensible investment opportunities that match with the investment policies of one, or more, of its various funds. Most investments are into SME businesses or projects, which benefit from contractually-backed, visible cash flow streams, going out into the future. These typically have creditworthy customers, such as local authorities or the NHS. The firm welcomes discussions about financing such opportunities.

“We usually raise capital in advance of executing our investments,” explains Michael. “We are therefore, perhaps somewhat paradoxically, benefiting from the current environment where we have substantial funding available, at a time when banks and other institutions are turning away great financing propositions.”

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