

EII TAX RELIEF INVESTMENT OPTIONS 2017



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- Up to **40% tax relief** available.
 - 75% x amount subscribed deducted from total income 2017 or 2018.
 - 25% in year 4 or at the end of investment period.
- **All income tax relief – includes unearned income (rents, dividends, pensions, ARF distributions etc.)**
- Tax Relief on **up to €150,000 investment** per annum.
- Qualifying individual - tax resident & paying income tax in Ireland.

A.

Davy / BDO



- BES Funds
- Joint Venture with BDO & Davy
- Minimum Investment €5,000
- Maximum Investment €150,000
- Once off entry fee: 3%
- Tax Relief on:
 - PAYE
 - Rental Income
 - ARF Income
- Relief Available
 - 30% in Year 1
 - 10% in Year 4*
- 4 Year Minimum
- High Risk Investment

*subject to certain criteria being met



B.

Cantor Fitzgerald



- Private Equity Investment
- Boxever Limited
- Minimum Investment €25,000
- Maximum Investment €150,000
- Once off entry fee: 3%
- Tax Relief on:
 - PAYE
 - Rental Income
 - ARF Income
- Relief Available
 - 30% in Year 1
 - 10% in Year 4*
- 4 Year Minimum
- High Risk Investment

*subject to certain criteria being met



Funds Criteria / Investment Mandate

- Established companies with a 3-5 year **strong trading record**.
- Capable and experienced **management team**.
- Companies involved in **growth sectors** and/or with **growth potential**.
- Positive net asset value and **low gearing** levels.
- **Ability to repay** investment after 4 years.



Boxever Limited

- **High potential growth** company.
- Data Science using SaaS – Software as a Service.
- Strong **pipeline of customers** including **blue chip names**.
- Highly **predictable revenue streams**.
- **Stable and predictable** financial profile.



Important Information

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