



SWOOP ADVISOR PARTNER PACK



Everything you need as a Swoop Partner

The Swoop logo, featuring the word "Swoop" in a dark blue, sans-serif font. The letter 'o' is stylized with a white swoosh that curves over the top and ends in a small arrowhead pointing to the right. The logo is positioned over a teal background that occupies the bottom half of the page.

Swoop

THE ONE-STOP MONEY
SHOP FOR YOUR BUSINESS

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ABOUT SWOOP

SwoopFunding.com is a business funding and savings platform to enable advisors to help their clients discover the right funding solutions across debt, equity and grants and to identify and easily make savings in one fell swoop.

The platform simplifies and speeds-up access to loans, grants and equity finance for your businesses. Swoop analyses every opportunity on the market, so that you can present your client with relevant matched funding solutions in seconds. Once you identify the best options, our team of experts will manage your client's application from beginning to end.

We work with over 1,000 funding providers from mainstream banks, alternative lenders, venture capital funds, SEIS/EIS funds, angel investors and grant agencies.

We know how confusing finding funding can be for most SMEs - with Swoop you can easily support your clients with the process. You can help your clients track the progress of their applications through your online profile, as well as receiving notifications each

time the next step in their application has been completed.

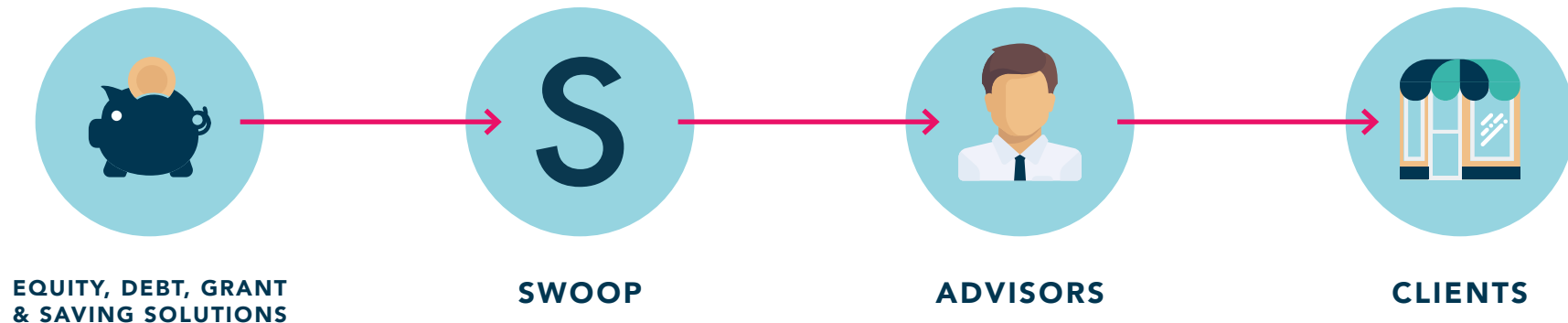
We've introduced user friendly technological features, so that the process is smooth and efficient, such as connections into companies house and every major accountancy package - so that you aren't endlessly filling forms or having to upload key data or documents. All information stored in Swoop is for your eyes only and no credit checks are run on your clients unless they have been submitted to a funding provider with your permission.

**LET SWOOP HELP YOU
UNLOCK YOUR CLIENTS
TRUE BUSINESS
POTENTIAL.**

WHY PARTNER WITH US?

UK SMEs have little or no visibility of all of the funding solutions available to them across debt, equity or grants. 68% regularly cite access to finance as one of the main barriers to growth.

Swoop empowers you to find, compare and select the right funding for your clients. Our smart tech is combined with experienced finance professionals made up of ex underwriters, accountants and equity analysts. So we provide our expert opinion and advice and manage the application through to completion. Swoop also allows you to find savings for your clients through our Open Banking technology (this is where the major UK banks have enabled chosen providers such as Swoop to integrate with our clients bank accounts to find them savings and help them switch to cheaper providers). Through leveraging Swoop's Open Banking API, you can see how much savings your client can make in any year and apply to switch for your client across their expenditure on Foreign Exchange, Utilities, Broadband, Mobile Phones and Insurance. All of this is done automatically through our technology coupled with our expert team.



WHICH OF YOUR CLIENTS WILL GET THE MOST OUT OF SWOOP

- * **DEBT:** THE RANGE IS £25K - £30M WITH OUR AVG TRANSACTION SIZE AT £250K
- * **EQUITY:** £100K - £50M - AVG SIZE AT £600K
- * **GRANTS:** £1K - £60M - AVG SIZE GRANT AT £150K

YOUR CLIENTS WITH THE FOLLOWING WILL GET THE MOST OUT OF SWOOP:

- ✓ Revenue Generating or
- ✓ Have active customer base or
- ✓ Have/are building innovative product/service

WHEN IT'S HARDER FOR US TO HELP:

- ✗ Companies with tax arrears, unsettled CCJs or very poor personal credit rating of Directors

HOW WE HELP

1

ADD YOUR CLIENT INTO SWOOP AND ANSWER ONE FORM WHICH TAKES 2 MINUTES TO COMPLETE



2

OUR SOFTWARE WILL MATCH ALL SUITABLE FUNDING SOLUTIONS AND WILL SUGGEST THE MOST RELEVANT DEBT, EQUITY AND GRANT SOLUTIONS



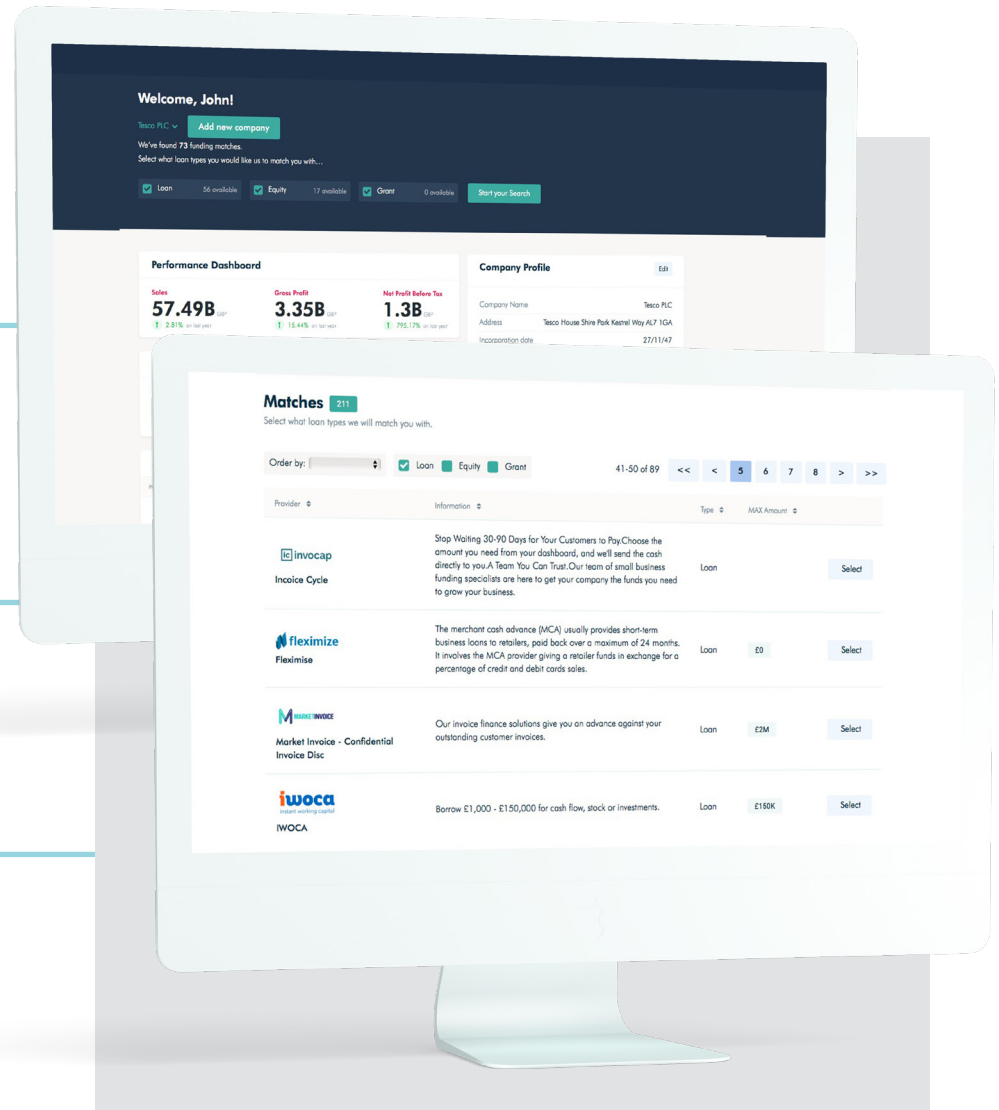
3

TALK TO THE SWOOP TEAM ON WHICH SOLUTION YOU'D LIKE YOUR CLIENT TO PROCEED WITH



4

SWOOP TEAM MANAGES THE END-TO-END PROCESS FOR YOU, UPDATING YOU ALONG THE WAY



GETTING STARTED

**IT'S VERY EASY TO GET STARTED AS A PARTNER OF SWOOP.
SIGNING UP TAKES LESS THAN 5 MINUTES [CLICK HERE TO BEGIN](#)**

YOU REFER THE CLIENT TO SWOOP:

1. Swoop qualifies the enquiry
2. Swoop submits & manages the deal
3. You & your clients track the process

OR

YOU CONTROL THE FUNDING:

1. You list your client's enquiry
2. You pick the lenders
3. You are the point person for lenders

It's your choice, but if you have any questions, we're here to help.

HOW WE SUPPORT YOU

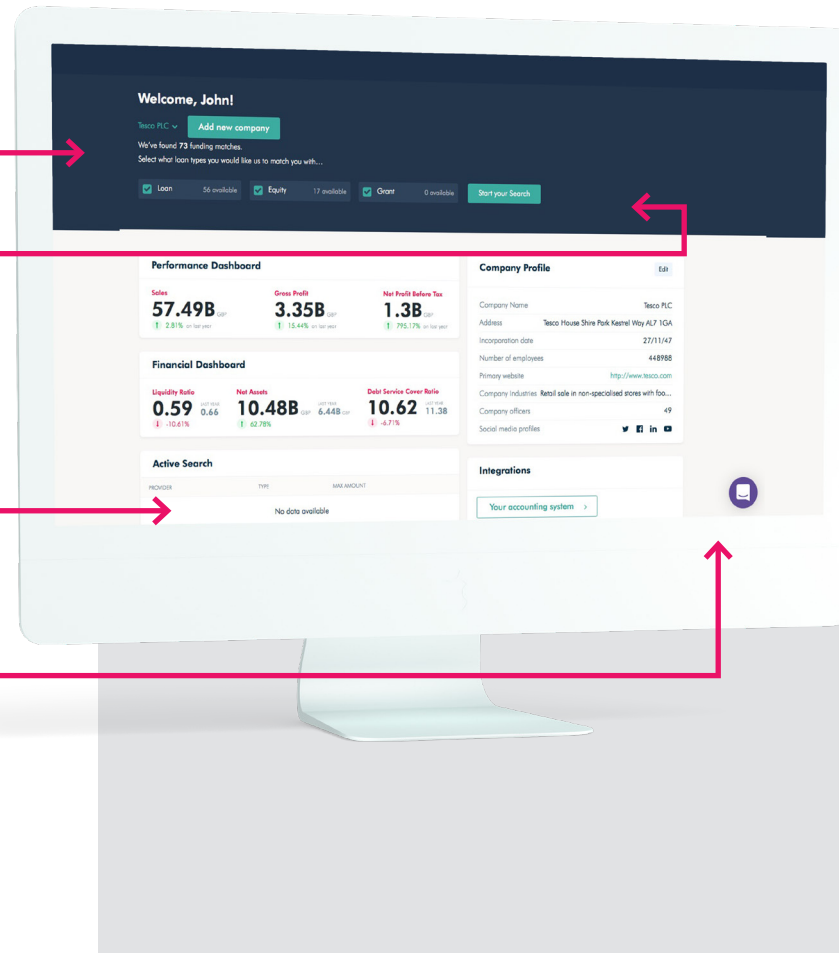
- We have a live chat function on Swoop, so you can discuss in real-time with our consultants any questions you have.
- Or just pick up the phone, and one of our team will be happy to help.

HOW TO GET YOUR COLLEAGUES ON THE PLATFORM TOO

Set-up takes 5 minutes - we simply ask you a handful of questions.

THIS IS YOUR SWOOP DASHBOARD

- ADD CLIENT
- RUN A FUNDING SEARCH
- MONITOR LIVE DEALS
- ADD CLIENTS ACCOUNTANCY SOFTWARE



You can integrate your client's accountancy package in seconds which gives you more accurate set of matches and dramatically speeds up the time to get your client funded.

Swoop integrates with companies house and every major accountancy package, so you will be able to on board every client within a few minutes and pull all their essential financial data into one dashboard. You can also select to integrate your clients bank account to find savings.

WHICH FUNDING TYPES DO WE SUPPORT?

DEBT

Swoop works with a broad range of debt providers from major UK banks to alternative lenders to British Business Bank regional debt funds.

Our bespoke technology and matching engine tracks your client's financial and business performance and predicts accurate debt solutions that will help stimulate growth in that business.

Swoop also identifies for you when it's the right time to take on certain debt facilities as we understand the dangers of hurting your client's credit score through needless loan applications.

Some of the most common debt facilities secured through Swoop are trade finance, asset finance, invoice finance, business loans, cash flow finance, IP finance and commercial finance.

EQUITY

Swoop has a very active equity investment base that tracks businesses at all stages of their business cycle from early stage SEIS investment right through to venture and growth capital.

Swoop works directly with a wide range of equity funders such as high net worths, angel groups, SEIS/EIS funds, VC funds and family offices.

Swoop combines your client's business performance and proposition with our equity team to deliver the best fit in equity partners. We can also assist in developing and creating pitch documents and help you get your client investor ready. We stick with you and your client along the process to completion.

GRANTS

The government has an average of £12bn allocated each year for SME supports but 71% of SMEs in the UK have never applied for a grant.

A huge barrier to grants for SMEs has been transparency in their existence and lack of knowledge around eligibility. Swoop changes this instantly as your clients can see straight away what grants are available to them and whether they are eligible to apply.

Swoop tracks hundreds of live grants regionally and nationally and updates the site as soon as new ones come onto the market.

Grant applications can be tedious and cumbersome, so we also have a grant application service on hand for any time poor clients.

DEBT

Swoop works with an extensive range of debt providers that can offer your clients a number of facilities that help growth and boost cash flow. Through your Swoop dashboard you will see which facilities would be a good fit for your client based on their financial and business data.

Below are a number of the most common solutions offered through Swoop:

Invoice Finance - Many businesses need to wait for raised invoices to be paid. With invoice financing in place, your clients can access instant funding by advancing a percentage of their receivables.

Asset Finance - Help your clients access funding for the property, equipment, machinery and tools their business needs. We deal with specialist providers who provide low cost/low deposit options or leasing options for purchases as well as providers who are able to look at refinancing existing assets.

Trade Finance - Trade finance can help to fund clients' supply chains from start to finish by purchasing stock from suppliers on their behalf with loans secured against new purchase orders.

Business Loans - The Swoop Debt team can assist SMEs fund their growth, deal with one-off events or manage cashflow more efficiently. We work with a large number of providers, so that we can offer solutions to SMEs of all sizes and stages. We have a range of unsecured and secured options in this space.

Cash Flow Finance - Swoop deals with a very wide range of providers who look to offer both secured and unsecured funding aimed at helping companies with their short term funding needs. Works in a similar way to an overdraft – pre agreed facility which you only pay for as you need to use.

IP Finance - This is an innovative debt facility that is just coming onto the market that allows IP intensive businesses get debt facilities in place against the value of their IP. The facility allows businesses to realise cash from the development costs spent creating the IP and the future value that IP will bring to the business. Facility works particularly well for software businesses.

EQUITY

Swoop works with a broad range of equity investors across the UK, Europe and the US.

The platform initially assess your client's business data against our equity partners before our investment team progresses the application forward if it is a good fit. The investment team also provide a number of services around preparing key documents for equity investment which you can see here.

High Net Worths/Angels - Swoop works with a network of high net worths and angel investors who seek out early stage investment opportunities through the platform. Investors in this space tend to invest through the SEIS or EIS investment schemes and will look to invest between £50k - £500k in a business.

Growth Funds - Swoop works with UK funds that will invest through the SEIS/EIS/VCT or BBB investment schemes. SEIS is suited to young start ups whereas EIS/VCT seek revenue generating businesses.

VCT's aim for businesses with minimum £1m turnover. There are also specialist funds for sectors such as education/auto tech/AI or funds based on regional locations. Cheque sizes range from £350k to £5m.

Venture Funds - Swoop works with venture capital and private equity funds. Businesses need to be able to show large exponential growth to be a good match as venture funds will be looking to exit each opportunity at a high multiple to satisfy their own investors. Cheque sizes range from £2m - £50m.

Family Offices - Swoop has a network of family offices who like to invest in businesses looking to scale. Family offices tend to offer more patient capital than venture funds as the need for a 5 year ROI is not a priority. Family offices tend to make investments where they can also offer strategic advantages through their own network. Cheque sizes range from - £500k - £15m.

Tier 1 Investment - Swoop works with a number of Tier 1 providers who help match foreign investors with UK businesses. Investors must place a minimum of £200k into the business to be deemed eligible by the Home Office for a visa. Tier 1 can be a great form of investment for businesses looking to increase working capital without having to give a way a huge amount of equity while also gaining exposure to another market.

Crowdfunding - Swoop works with Crowdcube, Seedrs and the Syndicate Room to help businesses identify when they are a good fit for crowdfunding as a form of investment. Crowdfunding can be highly beneficial for B2C businesses that have a mass market appeal, so that investment rounds can also be great marketing campaigns too. We also can identify when NOT to go for crowdfunding as it can be an expensive exercise when it is not the right route for the business.

GRANTS

Billions of funding gets poured into grants across the UK and Europe every year but more often than not, businesses and in particular SMEs never think of it as a viable funding route to finance projects.

Barriers include lack of awareness of grants, the time, effort and complexity of grant applications and lack of understanding around the eligibility rules.

With Swoop, you can instantly assess what grants are available to your business, what the eligibility criteria are and what is involved in the application form.

Grants can be particularly useful for businesses headquartered in regions outside of London or for innovative and knowledge intensive businesses where there is a significant R&D investment.

Swoop taps into all grants that are available regionally, nationally and internationally - so your clients will get a good read on what is a good fit for them based on their location, their industry and what their project requires. Grants usually need to be matched funded which Swoop identifies at the same time.

Grants can be used to fund business growth and the most common themes you will see grants offered around Swoop are:

- Increasing employment in a certain area
- Investment in new technology
- Investment in new processes
- Collaborating with other businesses
- Improving the environment
- Improving sustainability
- Societal Impact

CASE STUDIES

TYPE OF FINANCE:

IP FINANCE

TYPE OF BUSINESS:

EDUCATION SOFTWARE

T/O: £900K

FACILITY: £250K

SECTOR: EDUCATION

LOCATION:

GREATER LONDON

AGE OF BUSINESS: 9 YEARS

REASON FOR FUNDING:

MARKETING OF SOFTWARE

TYPE OF FINANCE:

TRADE FINANCE

TYPE OF BUSINESS:

ECO FRIENDLY PACKAGING

T/O: £800K

FACILITY: £175K

SECTOR: PACKAGING

LOCATION:

LONDON

AGE OF BUSINESS: 2 YEARS

REASON FOR FUNDING:

FINANCE SUPPLY CHAIN

TYPE OF FINANCE:

INVOICE FINANCE

TYPE OF BUSINESS:

RECRUITMENT

T/O: £5M

FACILITY: £2M

SECTOR: OIL & GAS

LOCATION: SOUTH EAST

AGE OF BUSINESS:

15 YEARS

REASON FOR FUNDING:

CASHFLOW

TYPE OF FINANCE: ASSET

FINANCE & CAPITAL GRANT

TYPE OF BUSINESS: COFFEE

T/O: £1.2M

FACILITY: £30K GRANT

+ £270K ASSET FINANCE

SECTOR: FOOD & BEVERAGE

LOCATION:

EAST MIDLANDS

AGE OF BUSINESS: 2 YEARS

REASON FOR FUNDING:

PLANT & EQUIP

TYPE OF FINANCE:

ACQUISITION FINANCE

TYPE OF BUSINESS:

IT SERVICES

T/O: £12M

FACILITY: £2M

SECTOR: IT

LOCATION:

SOUTH EAST

AGE OF BUSINESS: 8 YEARS

REASON FOR FUNDING:

ACQUIRE A COMPANY

TYPE OF FINANCE:

VCT EQUITY

TYPE OF BUSINESS:

AUTOMOTIVE OEM SUPPLIER

T/O: £7M

INVESTMENT RECEIVED:

£2.5M

SECTOR: AUTOMOTIVE

LOCATION: EAST MIDLANDS

AGE OF BUSINESS: 10 YEARS

REASON FOR FUNDING:

SCALE UP

KEY CONTACTS

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