

FINANCIAL ADVISERS ONLY // JUNE 2023

### Who can assess the 7IM Discretionary Service?

The 7IM Discretionary Service is available to individuals, corporate and partnerships, charities and trusts who have a financial adviser.

### The 7IM Discretionary Service is suitable for clients who:



Are a UK resident



Have an FCA Regulated financial adviser



Are willing to open a 7IM account or have a third-party SIPP or Bond



Have over £200,000 to invest\*



May wish to access a range of tax wrappers



Want to save for either capital growth or income



Looking to invest in a discretionary strategy that uses 7IM investment solutions



Wish to consolidate and see all of their investments in one place



Wish to have a relationship with 7IM and the option of face to face reviews of their portfolio



Wish to invest for the medium-to-long term



Wish to seek advice and defer ongoing management of their portfolio to a dedicated team

\*The minimum investment amount is dependent on the client's individual circumstances and can be waived at 7IM's discretion.

For those accessing the Retirement Income Service: clients who are seeking greater control over their income in retirement while mitigating many of the pitfalls associated with income drawdown

Please refer to **7IM Investment Account, ISA and JISA target market** or the **7IM SIPP target market** for wrapper specific requirements.

You should be aware that the value of investments may go up and down and you may receive back less than you invested originally.

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### The 7IM Discretionary Service is not suitable for those who:



Do not wish to use a financial adviser



Are US or EEA resident



Cannot bear loss of capital



Have a short-term view to investments



Have very small portfolios



Looking to invest in a discretionary strategy that uses non-7IM investment solutions



Are looking for a self-serve or execution only type service with no advice



Are looking to transfer investments from elsewhere with guarantees or protections that cannot be maintained (e.g. life products).