

DISCRETIONARY INVESTMENT SERVICE

About 7IM and radical common sense

We're Seven Investment Management – or 7IM – an investment management business that helps individuals and their families manage their capital to meet their financial needs and aspirations. We've been around for well over a decade, which means we've probably seen the best and worst the world can throw at us. Yet we've still delivered an investment performance consistent with what we've promised our clients we'd try to do.

Our Discretionary Service is as straightforward or as complex as each client's needs. You can have the confidence that an experienced investment manager is managing your money with the discipline and rigour of our uniform investment process, combined with the flexibility of a personal service.

A 7IM relationship manager works alongside your financial planner to understand your personal circumstances, your attitude to risk and your goals. They share responsibilities, but both have the same objective – to put you and your needs at the heart of this service.



HOW IT WORKS

The basic building blocks of any portfolio are the main 7IM risk profiled strategies – enhanced with a selection of specialist strategies, as personal circumstances dictate.

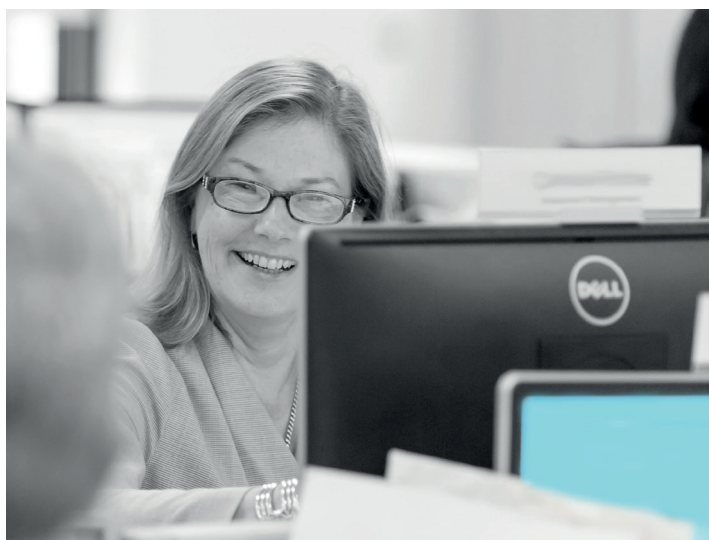
We run a series of active and passive strategies domiciled in London or in Dublin. Where it makes sense for certain portfolios, we will also identify complementary investment strategies run by external managers.

Portfolios can be managed within or outside tax wrappers, as well as held onshore or offshore. We also provide clients with lending services.

We aim to make your money work as efficiently as it can and we are continually evolving and adapting our investment services to achieve this.

One of our relationship managers works with you and your adviser to agree the most appropriate portfolio for you, depending upon your objectives and attitude to risk. Of course you must remember that the value of investments will fluctuate and there is potential for investors to get back less than they originally invested. Past performance is not a guide to the future.

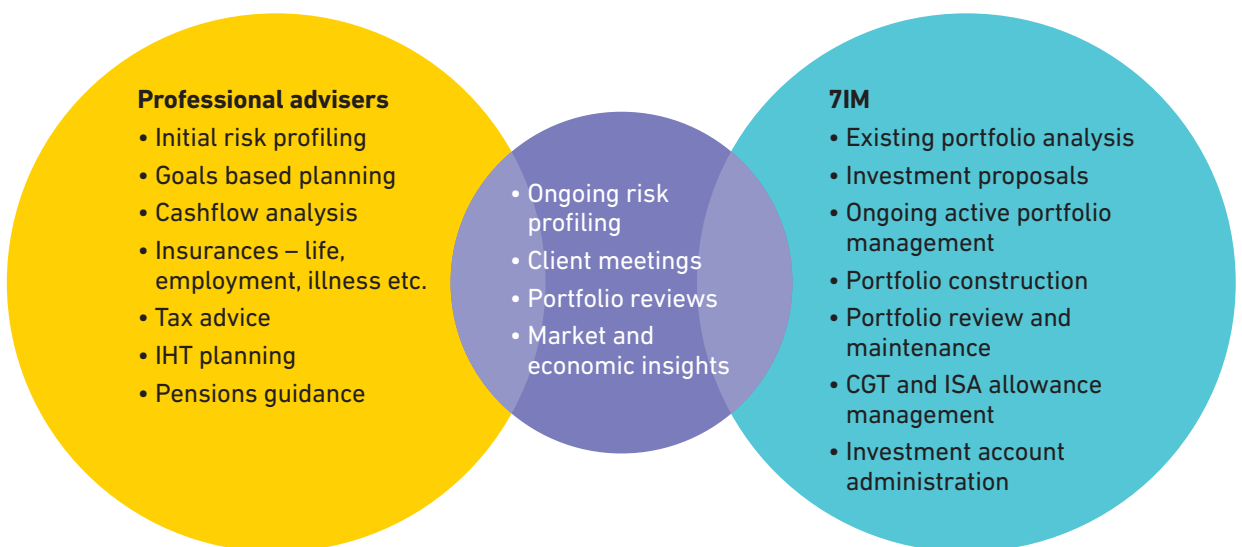
Our investment strategies can be implemented with funds or through segregated portfolios. Your adviser will agree with you which structure is most suitable for you. In each structure, we follow the same rigorous investment discipline and you can rest assured that clients benefit from our global approach and our ability to manage currency risk.



HOW IT BENEFITS YOU

We work closely with advisers to create, manage and maintain portfolios – making sure your portfolio stays current and relevant as your circumstances evolve and market conditions change. The picture below indicates the likely division of labour, but in practice we work out what works best for each individual situation.

The division of labour will typically look something like this...



In practice, we work out what works best for each relationship as it develops.

Working with you

On the one hand, you enjoy the reassurance of a more predictable approach to investing and a safe pair of hands; on the other you get flexibility where you really need it – in how we work with you.

Our service is as straightforward or complex as each client's needs. You know what we are doing for you and why. Our costs are clear and defined, so you know at the outset how much you are paying and what you are paying for. There are no dealing commissions and no hidden costs.

We will also keep you up to date with our investment insights and our latest technology. 7IMagine will help you and your adviser bring your portfolio to life – it is interactive, easy to use and free!

However you want to work with us, everyone gets straightforward explanations and digestible information. We work hard to make it this way because people understanding their money is too important for us to do anything else.



WHY IT ALL ADDS UP

It adds up to radical common sense because we impose discipline and process, which is essential, in how we manage money. At the same time we deliver a service that's flexible and individual. It's both our approach to service and how we manage money that define us. Radical or otherwise they're the only things that matter. We'd love you to come and put us to the test.

If you would like further
information regarding any of our
services, please contact us on
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