

Flexibility by design

The 7IM Platform – choice, efficiency
and innovation for you and your clients



Succeeding together

7IM

Capital at risk

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

7IM considers that the obligation to provide appropriate advice and explain the risks inherent in the portfolios falls to advisers.

7IM PLATFORM SERVICE

PROFESSIONAL ADVISERS ONLY

Contents

About 7IM	3
7IM Platform for advisers	4
Serving you and your clients	4
Five reasons to choose 7IM	4
Comprehensive service	5
Flexibility and choice	6
Making yours and your clients' lives easier	6
Five reasons to choose 7IM	6
Designed for you	7
For each of your client's needs	7
Flexibility & choice	7
Partnering with you	7

About 7IM

We're 7IM. As an investment management business, we help individuals, their families and advisers manage their capital to meet their financial needs and aspirations. We look after over £22 billion of our clients' money as well as our own. Our team of more than 600 people is focused on delivering the best outcomes for all of our partners and clients.

We started our business in 2002 with the aim of doing things differently. Our platform followed soon after because we wanted to build something that was efficient and effective, and more importantly, open architecture. Financial advisers choose our platform because it provides a wide range of investment solutions, accessed through an engaging adviser and client experience.

When you partner with us, you benefit from a flexible, cost-effective solution that helps you provide your clients with exceptional service and a broad range of investment options. Offering choice and scalability, our platform supports you as your business grows.

2002

Founded in 2002

600

A team of almost 600 people

£22 billion

Over £22 billion of assets under management

7IM Platform for advisers

Serving you and your clients

As a 7IM Platform user, you benefit from a service that makes it easy to manage all your clients' portfolios. Using the latest technology and offering a complete toolset, you can implement your clients' financial plans with minimum hassle.

Because it was designed from the start as an open-architecture platform, you have access to a broad range of investment solutions as well as a long list of discretionary fund managers and product wrappers. No matter the investment proposition you want to deliver to your clients, our platform makes it possible.

Flexible, cost effective and service led, it enables you to run your business efficiently and manage client portfolios effectively.

Five reasons to choose 7IM:



1. Do it all

Access a wide range of equity and fixed income securities, funds, model portfolios and tax wrappers.



2. Flexibility

Meet your clients' needs as they evolve, from straightforward investment management to more complex financial planning arrangements.



3. Service

Benefit from high-quality reporting, multiple currencies, user-friendly technology and a dedicated client support team.



4. Innovation

Benefit from an innovative experience delivered digitally via both our client website and award winning app, 7IMagine.



5. Partnership

When you choose our platform, you are in the driver's seat. With access to training, plus ongoing innovation and development based on your feedback, you can boost your business with a platform that scales up as your business grows.

Comprehensive service

The 7IM Platform is more than a simple platform – it's a service. When you choose to work with us, you will have the support of a dedicated team of relationship managers who can help you get the most out of the technology.

We understand that financial markets move quickly and your clients' circumstances are constantly evolving. That's why our platform provides you with the tools and resources you need to maintain a market-leading proposition and provide your clients with the best solutions.

We pride ourselves on providing you with an exceptional experience. Our relationship managers work closely with you to make sure the platform meets all of your needs and helps you to build an efficient and effective business. We make sure the platform is kept up to date with all the changes in regulation.

You also have access to our platform service team, who are on hand to answer any queries you may have about using the platform.

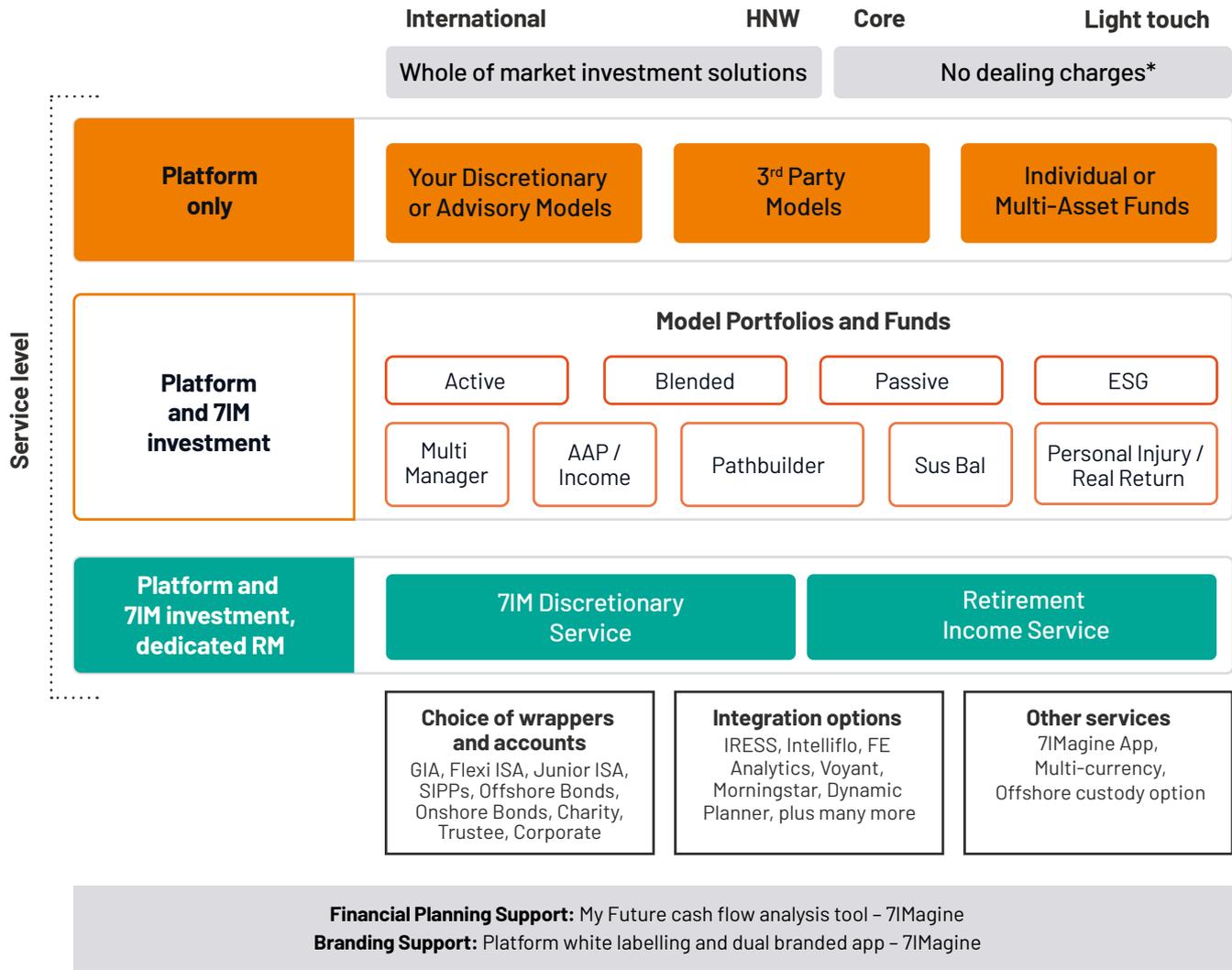
Flexibility by choice

Making yours and your clients' lives easier

The 7IM Platform provides your clients with a solution for every step of their investment journey. Whether you want to manage your clients' investments yourself, use our model portfolio service or outsource to a discretionary fund manager, you benefit from maximum flexibility.

7IM Platform

Service and support to help grow your business



*except for overseas listed securities

Partnering with you

Designed for you

We designed the platform to be efficient and cost-effective. Its award-winning functionality, advanced financial planning tools and streamlined reporting processes help you save time and, more importantly, engage with clients who value your advice.

For each of your client's needs

No matter where your clients may be on their financial journey, we built our platform so that it meets a broad spectrum of needs. From basic investment accounts to discretionary fund managers, self-invested pension plans, offshore bonds and beyond, our platform allows your financial planning to be as complex as your clients' circumstances.

Flexibility & choice

Our philosophy is to provide you with maximum flexibility, be it access to onshore and offshore bonds or multi-currency options. If you are seeking to outsource your investment management, you can choose a third-party model or discretionary manager, or select one of 7IM's solutions. Either way, you will always receive the same level of service and support from our team.

When you select an investment platform, it becomes more than a tool for your job – it's a business solution.

That's why we have worked hard to build what we think is the best platform for financial advisers. Not only does it allow you to manage your clients' assets, it also enables you to run a more successful business.

We treat all our advisers as business partners with a shared vision – to deliver the best outcomes. Our platform support team can provide you with comprehensive training or simply guide you through specific tools.

You benefit from:

- A full suite of financial planning tools
- Direct access to a knowledgeable support team
- Comprehensive training and guidance
- A dedicated relationship manager
- In-depth client review and reporting tools
- Ongoing innovation and improvements

Seven Investment Management LLP is authorised and regulated by the Financial Conduct Authority.
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