7IM

FAQ

Supporting guidance about our Platform

JANUARY 2025

Click on the buttons below to find out more.

Wrappers

These pages provide guidance on how to open, top-up, and manage the various wrappers available on our platform.

GIA	ISA	7IM SIPP
Non-personal	Junior ISA	Junior SIPP
	Third Party Bonds	Third Party SIPP

Help videos

These videos provide guidance on how to use our platform to do certain activities or get information.

Pre-sales & Account Opening	Account Maintenance	Client Reporting	Trading
• Illustrations • Applications • Retirement Income Solution • Secure Lifetime Income	• Standing investment instructions • Regular withdrawals • Ad-hoc withdrawals • Linking clients	• Investment reports (CRRs) • Tax packs • Client online access	• DFM models • Model linking • Bed & ISA • Favourite funds list • Buying • Selling

Platform Service Team

Please contact our Platform Service Team if you have any questions about using our platform or about clients who are on our platform.

Our contact details and meet the team

Client facing help

These pages are designed for your clients to read to find out more about 7IM and how they can access their 7IM account.

About 7IM	The 7IMagine App	The Client Portal	Our Client Brochure

Useful documents - all available in our Literature Centre

Platform User Guide	7IM Bank Details
GIA ISA Key Features	Guide to Illustrations
7IM SIPP Key Features	Client Asset Security
Client Terms and Conditions	Integration with FE Analytics

www.7im.co.uk