

FOR IMMEDIATE RELEASE

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## 7IM RECEIVES REGULATORY APPROVAL FOR JERSEY OFFICE AND ANNOUNCES TEAM

- **7IM Jersey office to formally open next week**
- **Team led by Grant Hamilton**

**Seven Investment Management (7IM)** has received regulatory approval from the Jersey Financial Services Commission (JFSC) to open a Jersey office. **7IM's** Jersey branch will open for business next week and will be based in St Helier. It will build on 7IM's existing client base in Jersey, developed since the company was launched in 2002.

**7IM's** Jersey office will be led by **Grant Hamilton**, who was previously a director of Rathbones in Jersey.

**Stewart Sanderson, Head of Private Client, 7IM** said: "This expansion is an exciting part of our evolution and adds a Jersey base to complement our existing offshore offering. It provides a physical presence to help us offer discretionary management alongside our suite of services, including Dublin domiciled active and actively managed passive funds, and an open architecture platform with custody arrangements in Jersey.

"We continue to see strong demand in Jersey for our discretionary investment services and platform. We feel Jersey is as an important international centre and a key part of our long term strategic development."

**Grant Hamilton, Relationship Manager and Head of the Jersey branch, Seven Investment Management (7IM)** said: "It is a real privilege to be leading 7IM's Jersey team and to have played a part in making this happen. 7IM has an exciting cost effective offering, combining discretionary management services and the offshore fund range with innovative platform service, technology and advanced reporting, something that sets us apart from many. We are looking forward to working with trustees, consultants, financial planners, private clients and their advisers who will be able to benefit from our award winning approach."

### The 7IM Jersey team

The initial Jersey team, backed up by the 7IM London office, are:

#### **Grant Hamilton**

Prior to joining 7IM, Grant was a director of Rathbones in Jersey responsible for relationships with trustees, consultants and private clients. Grant holds a BSc (Hons) in Financial Services, is an Associate of The Institute of Financial Services and a member of the Chartered Institute of Securities and Investments.

#### **Dominic Pallot**

Dominic has over 35 years' experience in offshore financial services with trust company firms such as First Names and Walbrook Groups, banks such as Barclays Wealth and Abbey National, working in investment, cash management, and foreign exchange services. He is a Chartered Wealth Manager and is a Chartered Fellow of the Chartered Institute for Securities and Investments.

## **Annie Newman**

Prior to joining 7IM, Annie previously worked in portfolio management at Merrill Lynch for 12 years. Annie has been working in the offshore finance industry for over 20 years.

## **Ends**

### **For further information, please contact:**

Jemma Jackson  
PR Manager, 7IM  
jemma.jackson@7im.co.uk  
020 3823 8696  
07776 204 610

## **Notes to Editors:**

### **About 7IM**

It all began in 2002, with seven of us in a basement establishing Seven Investment Management (7IM) because we couldn't find anywhere we wanted to invest our families' money. Our assets under management now stand at around £12.5bn (more than doubling since 2013), and we have moved from 'basement' to 'Bishopsgate' in the City of London. There are now around 266 of us.

We manage money aiming to meet people's medium to long term return expectations. Fundamentally, we believe in active asset allocation in both active and passive investments (where we were one of the first to offer actively managed passive portfolios). We build global portfolios based on that allocation, and include alternative assets where appropriate to manage the risk reward trade off. Active currency management is also at the core of what we do.

7IM provides investment services to professional wealth managers, planners, advisers and private investors. These include: Discretionary investment management, a range of multi-asset portfolios, an investment and open architecture trading platform and a fantastic app, 7IMagine, which brings client portfolios to life.

### **Multigenerational investing**

We do our best to pass on economies of scale, reducing fees so more investors within a family save with us. Grandparents, through to parents and their children can invest as individuals with one charging structure – whether they live under the same roof or not.

A story of continuous innovation.

In 2013, we launched 7IMagine, an app allowing investors and advisers to keep up to date with their portfolio. The brainchild of some clients – professional 'gamers' uninspired by their paper statements – 7IMagine was enriched in February 2016, with My Future. Again using gaming technology, My Future allows advisers and investors to capture details about family or individual finances, including any number of streams of income, properties, other assets and expenses, to help identify how sustainable their finances are and if / when their retirement income will run out.

### **Our funds**

- Our **AAP fund range (Asset Allocated Passive)** is populated largely with passive structures to keep costs to a minimum. Asset allocation is actively managed to help exploit opportunities and reduce risk across the spectrum: **7IM AAP Adventurous, 7IM AAP Moderately Adventurous, 7IM AAP Balanced, 7IM AAP Moderately Cautious, 7IM Cautious and 7IM AAP Income**. Some of these risk profiles have funds domiciled in both Dublin (with UK reporting status) as well as the UK.
- Our **Multi-Manager fund range** invests in a range of active and passive vehicles. Costs still matter, but if we think an actively managed fund can outperform a passive alternative we have the freedom

to choose it. Asset allocation is actively managed. Again, there are different funds for different profiles: **7IM Adventurous**, **7IM Moderately Adventurous**, **7IM Balanced** and **7IM Moderately Cautious**. Again, some of these risk profiles have funds domiciled in both Dublin (with UK reporting status) as well as the UK.

- We also have a selection of funds designed to meet specific needs, such as the **7IM Personal Injury Fund**, the **7IM Real Return Fund** or the SRI focussed **7IM Sustainable Balance Fund**.
- We also have a range of 'smart passive' funds known as the equity value funds. The range includes: the **7IM UK Equity Value Fund**, the **7IM US Equity Value Fund**, the **7IM European (ex. UK) Equity Value Fund** or the **7IM Emerging Markets Equity Value Fund**. These are entirely systematically managed based solely on company fundamentals, the aim being to outperform the relevant passive market cap-weighted alternative by selecting profitable, high-quality, cash-flow generating companies that trade at a discount to their intrinsic value.

## **Our Model Portfolios**

The 7IM Model Portfolios are a range of risk rated portfolios and are available within our discretionary investment services and standalone on the 7IM platform and other platforms. The Models use the same investment process and asset allocation as our funds.

Our range of Model Portfolios are available across the risk profiles: **7IM Adventurous Model Portfolio**, **7IM Moderately Adventurous Model Portfolio**, **7IM Balanced Model Portfolio**, **7IM Moderately Cautious Model Portfolio**, **7IM Cautious Model Portfolio** and **7IM Income Model Portfolio**.

The 7IM funds and Model Portfolios are available through the 7IM Discretionary, Managed Investment, Platform, and Self Invest services, as well as on other platforms.

Important information: The information contained in this document does not constitute investment advice and if you are in any doubt about the suitability of the investment or service, you should consult a professional financial adviser. The value of investments, and the income from them, can fall as well as rise and you may not get back the full amount invested. Seven Investment Management LLP is authorised and regulated by the Financial Conduct Authority and by the Jersey Financial Services Commission. Member of the London Stock Exchange. Registered office: 55 Bishopsgate, London EC2N 3AS. Registered in England and Wales No. OC378740.

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