

FOR IMMEDIATE RELEASE

8 JANUARY 2018

THE RETIREMENT CHALLENGE: 7IM HOST 12 REGIONAL ADVISER ROADSHOWS

- **Speakers include Steve Bee, Mark Polson and Tony Wickenden**
- **Advisers can register online at www.7im.co.uk/adviser-events**

Seven Investment Management (7IM) will hit the road later this month with a series of regional adviser roadshows up and down the UK. Entitled 'The Retirement Challenge', 7IM will be covering 3,000 miles and visiting 12 locations in January and February.

Starting in Scotland and ending in Bournemouth, this annual series of 7IM roadshows is now in its fifth year. The events are free and CPD certificates are available.

To book a place, advisers can register online at www.7im.co.uk/adviser-events.

Justin Urquhart Stewart, Co Founder and Head of Corporate Development, 7IM said:

"Even with the most up to date GPS, navigating the retirement maze almost certainly hasn't got any easier. With increased regulation, greater choice, and increasingly complex client needs, these roadshows are intended to give advisers some practical steering points from some of the UK's leading experts."

Key speakers include:

- **Steve Bee, Pensions Strategist and CEO of Jargonfree Benefits:** Steve will be tackling a number of hot pension topics including the thorny issue of DB transfers.
- **Mark Polson, Principal & Mike Barrett, Consulting Director, the lang cat** will discuss 'have you got your centralised retirement proposition nailed?'
- **Tony Wickenden, Joint MD & Nick Edwards, Associate, Technical Connection** will delve into how to embrace tax alpha by utilising the tax wrappers available to you and your clients. For the Glasgow and Edinburgh events, **Julia Peake, Technical Development Manager, Sanlam** and **John Haley, Technical Sales Manager, Utmost** will cover these issues.
- **Paul Johnson, Director of the Institute for Fiscal Studies & Graeme Codrington, Futurist and CEO of Tomorrow Today and The Future of Work Academy** will be at our London event to enlighten us all on what the future retirees can look forward to, and we are not talking about world cruises!

7IM's investment team will discuss the economic and political backdrop, risks and opportunities and the challenges of demanding valuations, low bond yields and unusually low volatility. They will also explore why an increasing number of institutional players are looking at the alternatives space for solutions.

On a rotating basis, 7IM speakers include Ian Jensen-Humphreys, CIO; Alex Scott, Chief Strategist; Matthew Yeates, Quantitative Investment Manager and Ben Kumar, Investment Manager.

Tom Sheridan, CEO, 7IM; Justin Urquhart Stewart, Co Founder and Head of Corporate Development, 7IM, and Verona Smith, Head of Platform, 7IM will be hosting the events.

The Retirement Challenge – dates, places and speakers

Date	Region	Venue	Speakers
Tuesday 23 January	Aberdeen	The Chester Hotel	Steve Bee

			Mark Polson Nick Edwards Verona Smith Ian Jensen-Humphreys
Wednesday 24 January	Edinburgh	The Balmoral Hotel	Steve Bee Mark Polson Julia Peake John Haley Tom Sheridan Ian Jensen-Humphreys
Thursday 25 January	Glasgow	Blythswood Square Hotel	Steve Bee Mark Polson Julia Peake John Haley Tom Sheridan Ian Jensen-Humphreys
Tuesday 30 January	Leicester	Hilton	Steve Bee Mark Polson Nick Edwards Tom Sheridan Alex Scott Matthew Yeates
Thursday 1 February	London	Four Seasons, Park Lane	Steve Bee Tony Wickenden Mark Polson Mike Barrett Paul Johnson Graeme Codrington Tom Sheridan Justin Urquhart Stewart Ian Jensen-Humphreys Alex Scott
Tuesday 6 February	Newcastle	Ramside Hall	Steve Bee Mark Polson Nick Edwards Justin Urquhart Stewart Alex Scott
Wednesday 7 February	Harrogate	Rudding Park	Steve Bee Mike Barrett Tony Wickenden Justin Urquhart Stewart Alex Scott
Thursday 8 February	Manchester	Marriott Manchester Airport	Steve Bee Mike Barrett Tony Wickenden Justin Urquhart Stewart Ian Jensen-Humphreys
Tuesday 13 February	Cardiff	The Vale	Steve Bee Mike Barrett Nick Edwards Tom Sheridan Ben Kumar Matthew Yeates
Thursday 15 February	Birmingham	The National Motorcycle Museum	Steve Bee Mike Barrett Tony Wickenden Justin Urquhart Stewart

			Ben Kumar Matthew Yeates
Tuesday 27 February	Exeter	Sandy Park	Steve Bee Mike Barrett Nick Edwards Justin Urquhart Stewart Ian Jensen-Humphreys
Wednesday 28 February	Bournemouth	AFC Bournemouth	Steve Bee Mike Barrett Nick Edwards Justin Urquhart Stewart Ian Jensen-Humphreys

Ends

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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 £12bn (more than doubling since 2013), and we have moved from 'basement' to 'Bishopsgate' in the City of London. There are now around 240 of us.

Radical common sense

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 an offshore version of the fund.
- 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 an offshore version of the fund.
- 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. Like the Asset Allocated Passive (AAP) funds, the entire asset allocation is fulfilled with ‘Smart Passive’ market cap weighted passive instruments (for example UK and US equities) which track those markets and systematic instruments. 7IM undertake the due diligence on the passive securities (such as counterparty risk and concentration). 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. Member of the London Stock Exchange. Registered office: 55 Bishopsgate, London EC2N 3AS. Registered in England and Wales No. OC378740.

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