

PRESS RELEASE



FOR IMMEDIATE RELEASE

7 September 2023

7IM appoints Agustin Fernandez as its new Managing Director of Corporate & Strategy Development

7IM has expanded its Executive Management team with the appointment of Agustin Fernandez, who has taken on the newly created role of Managing Director, Corporate & Strategy Development.

The hire follows significant growth within the firm since Dean Proctor took over as CEO in 2019, with assets under management growing from £12bn to over £21bn in the past four years.

This growth has culminated in the recent announcement of Ontario Teachers' Pension Plan Board ("OTPP") entering into a definitive agreement to acquire a majority stake in 7IM from Caledonia Investments plc.

Fernandez will focus on driving the next chapter of strategic growth within the firm. In particular, he will spearhead merger & acquisitions (M&A) activities to support 7IM's strategic growth ambitions, as well as provide strategic insight to ensure the firm remains well positioned to deliver its strategic objectives and be competitive in the industry.

Commenting on the hire, Dean Proctor, CEO at 7IM said: "As 7IM enters its next phase of growth, I'm delighted to welcome Agustin to the firm. Agustin brings with him more than 20 years of experience in the financial services sector, both in investment banking and consulting. I am confident that his expertise will help us to continue our growth trajectory and support our strategic vision of delivering an unrivalled experience."

Before joining 7IM, Fernandez was heading investment banking for Wealth & Asset Managers and Wealth-Techs in EMEA at HSBC. He has led strategic M&A and corporate finance transactions in HSBC and Credit Suisse investment banking for over 15 years. Prior to this, he worked as a strategy and management consultant at PwC.

On his appointment, Fernandez added: "I am honoured to join 7IM. I was impressed by the vision, values, and culture that they have built and fostered over the years. I believe that we have a great opportunity ahead of us and look forward to working alongside Dean and his team and contributing to the strategic direction and growth of the business."

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Notes to Editors:

About 7IM

The “7” in 7IM refers to the seven original founders of the business.

Back in 2002, they couldn’t find a firm who they trusted to manage their families’ money properly – so they started their own company to provide the kind of investment service they were looking for themselves, but were unable to find.

Their aim was to deliver steady returns over the long term, while keeping an eye on risk, using the best available technology. They wanted everyone to have access to the kind of service and expertise that institutional investors would expect.

Our team, client base and funds under management have grown steadily over the years. From our offices in London and Edinburgh, more than 500 talented people manage over £20 billion for a range of clients, including individuals and families, financial advisers, corporates, charities and trustees.

At 7IM, we provide 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, a range of retirement solutions, and a fantastic app, 7IMagine, which brings client portfolios to life.

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