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FOR IMMEDIATE RELEASE

7IM BOLSTERS ITS INTERMEDIARY TEAM WITH SEVERAL SENIOR APPOINTMENTS

7IM has significantly strengthened its Intermediary Sales Team with the appointments of Andrew Watson as Head of Sales Management, as well as Simon Church as Business Development Manager Team Leader, and Gareth Perry as Business Development Manager.

In this new role of Head of Sales Management, Andrew reports into Verona Kenny, Managing Director of Intermediary at 7IM, and will be responsible for working with the regional sales teams to ensure high standards of collaboration, consistency and sales focus. He will also be responsible for a number of key relationships that 7IM has with its strategic partners.

Andrew brings over 30 years of industry experience and joins from M&G where he spent over 24 years at the firm, holding a number of sales focussed roles, including most recently Head of UK Wholesale Sales.

Simon will be responsible for managing 7IM's business development efforts across the Home Counties, while Gareth will focus on the South West. Their appointments significantly deepen 7IM's presence in the regions. Both Simon and Gareth will be responsible for working with advisory firms to identify opportunities where 7IM's technology and investment management services would complement and enhance their client propositions. They both report into Howard Hardy-King, Head of South West Intermediary at 7IM.

Simon joins from Tatton where he led the sales effort in London and the South East. Prior to that he held roles with Charles Stanley and Quilter Cheviot. Gareth joins from Zurich where he was the wealth account manager for the South West region. Prior to working at Zurich, Gareth spent time in roles at Verbatim Asset Management and MetLife.

Verona Kenny, Managing Director of Intermediary at 7IM said: "We are delighted to welcome Andrew, Simon and Gareth to 7IM. They bring a wealth of experience and underline our ongoing commitment to support the Intermediary market. Their combined experience and insight will be vital

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in helping deliver on our strategy to grow the Intermediary business by developing collaborative and long-lasting strategic relationships with our advisory partners.

Andrew Watson, Head of Sales Management at 7IM adds: "I'm excited to be joining 7IM at this time. A business with an entrepreneurial track record and impressive history of innovation. Alongside all the great people I've met, I've been really impressed with their dynamic and spirited client-centric culture and strong growth ambition."

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Notes to Editors:

About 7IM

It all began in 2002, with seven of us in a basement establishing 7IM because we couldn't find anywhere we wanted to invest our families' money. Our assets under management now stand at around £14bn, and we have moved from 'basement' to 'Bishopsgate' in the City of London.

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

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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. 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**.

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**.

In 2019, we launched **7IM Pathway**, a diversified range of passive multi asset model portfolios underpinned by our robust Strategic Asset Allocation (SAA) process. The Pathway Model Portfolios differ from our traditional offering and are built purely using a streamlined version of 7IM’s robust (SAA).

The 7IM funds and Model Portfolios are available through the 7IM Discretionary and Platform 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, the Jersey Financial Services Commission and the Guernsey 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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