

PRESS RELEASE

ANOTHER AWARD FOR THE TECHNOLOGY THAT HELPS CLIENTS PLAN FUTURE FINANCES

London, 21 September 2016 – Seven Investment Management today announced more industry recognition for their 7IMagine app and its cashflow modelling tool, My Future. In an evening ceremony on 20 September for the UK Platform Awards 2016, the team won *Leading Integrated Planning Tool Provider*.

Available from the Apple or Google Play stores, as well as via desktop and Surface Pro versions for Windows 8.1 and Windows 10 and above, 7IMagine allows anyone to capture details about their own and their families' finances. A wealth of options can be incorporated into any scenario and include any number of streams of income, properties and other assets. Published life expectancy tables (that can be adjusted to suit) and the basic state pension are automatically entered into the calculations for users. These combine to enable clients to best assess how they fund their futures.

In addition, 7IM has set up the capability for 7IMagine to be used by advisers on behalf of all of their clients. Information can be prepopulated for clients and then used by the planner to guide them through the various scenarios available. Together, they can determine whether the client's planned finances really will stretch for the duration of their retirement.

Verona Smith, Head of Platform for 7IM, stated: "We are delighted to see continued industry support. This really is appreciated as we encourage the take up of 7IMagine. We set out to offer 7IMagine for free to every planner that is interested in making sure their clients really understand what finances are needed to achieve their financial goals and aspirations. This is especially true now that all of us are living longer and given the new pension freedoms."

Since the launch of 7IMagine's My Future earlier this year, the firm has been delighted with the response of direct clients and industry partners alike. With nearly 5,000 downloads, 7IMagine aims to make a clear difference for investors to gain a greater understanding of their finances using a unique blend of games software and financial industry expertise.

7IMagine is particularly powerful when combined with the approach that 7IM takes to managing clients' money: to an expected return.

Originally launched in March 2013, 7IMagine won recognition from the UK Platform Awards that same year. In February 2016, the My Future capability was launched and picked up the *Investment Innovation Award* in June from the Financial Times (FT) Adviser publication's Online Innovation and Service Awards. The team also won the *5 Star Investment Award* from FT Adviser on the same evening.

7IMagine cannot be accessed by mobile phone given the depth of the capability, but once downloaded on an iPad, tablet or PC, users can swipe right to use 7IMagine as a guest. A Mac desktop version is expected to be released by the end of 2016.

NOTES TO EDITORS

About Seven Investment Management (7IM):

7IM provides investment services to professional wealth managers, planners and advisers. These include:

- Discretionary investment management with advice
- A range of multi-asset portfolios
- An investment and open architecture trading platform
- A developed range of banking services
- A fantastic app, 7IMagine, to bring the client portfolios to life.

7IM – a story of Continuous Innovation

Since 7IM launched back in early 2002, it has pioneered a continuous stream of developments regarding how investment services are provided and charged for. We could just provide a list of our awards but actually think it is more useful to tell you what we have done and what we have provided for clients and their planners - and there is still more to come.

- January 2001 – First Sterling Online Wrap Account launched with ongoing Asset Allocation
- January 2003 – First White Label live
- January 2004 – 7IM OEIC live
- July 2005 – 7IM Platform live
- September 2005 – New 7IM Income Fund launched
- February 2007 – 7IM Sustainable Balance Fund launched
- December 2007 – 7IM gains its own FSA authorisation and new institutional investors
- January 2008 – 7IM joins the London Stock Exchange
- March 2008 – 7IM launches the AAP (Asset Allocated Passives) range of funds
- October 2009 – 7IM introduces 3rd party multi manager funds into the DFM service
- October 2009 – 7IM Personal Injury Fund launched
- April 2011 – 7IM launches enhanced, 'on-demand' client reporting
- January 2012 – 7IM Unconstrained Fund launched
- June 2012 – 7IM launches Fixed Term Deposits
- January 2013 – 7IM launches Asset Backed Lending
- March 2013 – '7IMagine' launched
- June 2013 - Assets under Management pass £5bn
- October 2013 – 7IM launches preferred SIPPs with DP Pensions Ltd and Carey Pensions UK
- October 2014 – Assets Under Management pass £7bn
- January 2015 – Assets Under Management pass £8bn
- March 2015 – In partnership with AXA Wealth, 7IM announces preferred Offshore Bond offering
- June 2015 – Assets Under Management pass £10bn

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