

# PRESS RELEASE

## SEVEN INVESTMENT MANAGEMENT ROADSHOW KICKS OFF IN LONDON

*Keynote event heralds the start of a country-wide nine event series*

London, 1 February 2017 – Seven Investment Management (7IM) today published details of its annual financial planner roadshow, which kicks off on 2 February 2017 in London. It will see the firm stage events in a total of nine cities across the UK under the banner of 'Back to Radical Common Sense'.

The speakers include Mark Polson of the lang cat and Merryn Somerset Webb, Editor in Chief of MoneyWeek and a regular commentator on the UK's personal finance industry. 7IM's speakers include Tom Sheridan (Co-Founder and CEO), Justin Urquhart Stewart (Co-Founder and Head of Corporate Development), Chris Darbyshire (Chief Investment officer); and Verona Smith (Head of Platform).

The events have been organised to address today's investment industry concerns on a number of fronts. 2016 could have been measured in terms of conventional economic data, but the reality is that the year saw a number of wild cards played. In addition to Brexit and the election of President Trump, we also saw a bank bailout in Italy, a second interest rate rise from the Federal Reserve, the results of quantitative easing affecting bond markets globally, and new all-time highs reached in the Dow Jones and S&P 500 equity indices.

Justin Urquhart Stewart, co-host of the roadshow, remarked: "This is like living in a badly written Jeffrey Archer novel, a ripping yarn but sadly all too real. In this alternative facts, fake news era, it is increasingly difficult for clients to understand the impact that world events and financial markets have on their finances.

"Advisers are being asked to interpret the impact of these events for clients, ensure clients continue to invest in a financial plan, deal with constant regulatory change, as well as factor in what the investment industry trends mean for their own business – quite a challenge! We want to help industry practitioners make sense of what's going on and understand how we can support their businesses best."

In particular, the series of seminars will address:

- The reality of the regulatory framework being set by FCA's Financial Advice Market Review and Asset Management Market Study, as well as the pending MiFID II framework, and how that will impact adviser practices, platforms and their service providers
- What populist politics and the full European 2017 political agenda should mean for markets and investors' portfolios, and how advisers can help their clients
- In a world of lower returns, diminished safe havens and increasing longevity, what risks are retirees really facing and how can advisers address these
- What that means for 7IM, the services they provide and the ongoing commitment to evolve and innovate

The London event is the first of nine events across the country with seminars booked in for:

Thursday 2 February	–	London
Tuesday 7 February	–	Glasgow
Wednesday 8 February	–	Edinburgh
Wednesday 15 February	–	Manchester
Thursday 16 February	–	Southampton
Tuesday 21 February	–	Exeter
Wednesday 22 February	–	Bristol
Tuesday 28 February	–	Leeds
Wednesday 1 March	–	Leicester

Advisers interested in attending the 7IM roadshow should contact Jamie Evans on 020 3823 8822 or [Jamie.Evans@7im.co.uk](mailto:Jamie.Evans@7im.co.uk) to see if they would be able to attend or whether the team can follow up with the information being shared at the event.

# NOTES TO EDITORS

About Seven Investment Management:

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

- Independent 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
- June 2009 – 7IM introduces the Professional Investor Funds (PIF) into the DFM service
- 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
- January 2013 – 7IM launches Asset Backed Lending
- March 2013 – '7IMagine' launched
- June 2013 - Assets under Management pass £5bn
- October 2013 – '7IMagine' wins its first of many awards at the Aberdeen Platform Awards.
- October 2014 – Assets under Management pass £7bn
- January 2015 – Assets under Management pass £8bn.
- April 2015 – Assets under Management pass £9bn
- April 2015 - 7IM launch the Equity Value Funds, a range of Smart Passives
- June 2015 – 7IM wins '5 Star Investment Provider & Packager award' at the Financial Adviser awards
- February 2016 - My Future extension of 7IMagine launched
- February 2016 - 7IM PIFs re-launched as the 7IM Dublin Funds
- September 2016 – Assets under Management pass £11bn

For more information, please contact: Justin Urquhart Stewart, 7IM  
020 7760 8700 / 07866 427626 / justin@7im.co.uk

[WWW.7IM.CO.UK](http://WWW.7IM.CO.UK)

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Registered office: 55 Bishopsgate, London EC2N 3AS. Registered in England and Wales No. OC378740.