

PRESS RELEASE



14 MAY 2025

7iM STRENGTHENS ITS EXECUTIVE COMMITTEE WITH TWO KEY APPOINTMENTS

7iM today announces two senior internal appointments to further build momentum behind its ambitious growth strategy.

Harriet Massie has been promoted to Chief Transformation Officer, while Chris Phillips, previously Chief Transformation Officer, moves into the newly created role of Chief Value Officer. Both roles take effect from 1 June and report directly to CEO Dean Proctor.

Massie, who has been with 7iM since 2017 and most recently served as Transformation Director, steps into her new role at a critical time for the business.

She will lead 7iM's Transformation team, overseeing the delivery of its multi-year, multi-million-pound platform investment programme. Working closely with colleagues across the business, she will also drive execution of 7iM's broader transformation roadmap to support the firm's continued growth and success.

In the newly created role of Chief Value Officer, Phillips will lead 7iM's Product & Marketing function, with oversight across proposition, product design and development, product governance, and brand and marketing. He will also play a key role in shaping 7iM's long-term strategy, with a clear focus on creating long-term value for advisers and their clients.

Phillips joined 7iM in 2019 and brings deep experience in product, marketing, customer experience and transformation, having previously held senior roles at Barclays and Lloyds Banking Group.

These latest appointments follow that of Nick Allen as Chief Integration Officer this month to drive onboarding and harmonisation of recent and future acquisitions across 7iM as it positions itself as one of the leading vertically integrated wealth managers in the UK.

Commenting on the appointments, Dean Proctor, CEO of 7iM, said: "Both Harriet and Chris are proven leaders with a clear understanding of our business and the needs of advisers. Harriet has been a driving force behind our transformation programme—her focus and rigour will be key as we deliver on our platform investment programme and wider transformation plans. Chris brings real strategic firepower and experience as we continue to evolve our proposition and deliver value where it matters most."

Harriet Massie, Chief Transformation Officer at 7iM, added: "I'm proud to step into this role at such a pivotal time for 7iM. I look forward to leading the delivery of our transformation roadmap and working closely with teams across the business to implement the changes that will make the biggest difference to our clients, advisers and colleagues."

Chris Phillips, Chief Value Officer at 7iM, added: "It's a real privilege to take on this new role—one focused on creating more connected and consistent value for advisers, their clients,

PRESS RELEASE



and the business. We've made strong progress, but we're not standing still—there's more to do, and I'm excited to help lead the next phase of our journey.”

- Ends -

For further information, please contact:

Henry Chan

Head of Corporate Communications

7IM

Henry.Chan@7im.co.uk

020 3823 8696

07786 000 313

Notes to Editors:

About 7IM

At 7IM, we want to deliver an unrivalled experience for all of our clients – whether that's individuals, families, or businesses.

For financial advisers and planners, this involves us standing alongside them to support them with whatever they need, so they can focus more on what really matters: nurturing their relationships with clients to deliver on their financial plans. Our offering for advisers reflects that: an open architecture platform, multi asset investment solutions to fit whatever their investment philosophy is and help with discretionary investment management.

For our private wealth clients, it all starts with understanding the client, their families, and their goals and then creating a bespoke financial plan designed to help them achieve financial freedom.

We use cutting-edge technology to help make things simple and clear, but what really sets us apart is our real, honest, human service. No automated helplines or chatbots. You'll always talk to a person.

Today, from our offices in London and Edinburgh, our team of approximately 600 talented people are entrusted to manage over £24 billion (as at January 2024) for a range of clients, including individuals and families, financial advisers, corporates, charities, and trustees.

In January 2024, Ontario Teachers' Pension Plan, a global investor with net assets of \$255.8. billion (as at June 30 2024), acquired a majority stake in 7IM.

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. Registered office: 1 Angel Court, London EC2R 7HJ. Registered in England and Wales No. OC378740