

FOR IMMEDIATE RELEASE

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7IM HAND PICKED BY RSMR WHO LAUNCHES A NEW DISCRETIONARY FUND MANAGER RATING SERVICE FOR ADVISERS

Seven Investment Management (7IM) is one of just six Discretionary Fund Managers (DFMs) to have been given a prestigious new [rating](#) by RSMR as the fund ratings agency launches its new ratings service for advisers.

Robert Poulten, Head of Sales, 7IM said: “With the proliferation of products and services which can now come under the heading “discretionary”, advisers are increasingly looking for additional clarity when it comes to selecting discretionary fund managers. This rigorous, qualitative based new ratings system means RSMR have really got under the bonnet of how we run our portfolios within our various services, so it means a great deal to have been amongst the very first selected.”

The benefits of 7IMs discretionary service:

- Advisers can access 7IM through a wide range of discretionary services with active and passive approaches, unitised funds or segregated models all built around the clients’ objectives.
- 7IM offer very flexible services, with either client contact and suitability responsibility, updates and commentary or just simply investment execution, reporting and administration. There are also a range of custody and platform options with the 7IM Model Portfolio Service which are not just ‘products’ but come with a range of supporting insights from 7IM investment professionals.
- Perhaps unusually for a discretionary fund manager, we also work with other complementary investment managers to reduce risk and enhance portfolio returns where suitable.
- Portfolios can be managed within or outside tax wrappers, onshore or offshore custodied with UK or Dublin funds.
- The value of investments may go up and down and your investors may get back less than they invested originally.

Ends

For further information, please contact:

Jemma Jackson
PR Manager
Seven Investment Management
jemma.jackson@7im.co.uk
0203 823 8696
07776 204 610

About Seven Investment Management:

7IM provides investment services to professional wealth managers, planners, advisers and investors. 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

February 2016 – 7IM launches My Future a new feature of the 7IMagine app which allows advisers and clients to enter the details of their existing savings and pension contributions, as well as spending expectations in retirement to identify when their cash will run out.

August 2016 – 7IM launches a Windows version of the 7IMagine App which allows 7IMagine to be used on all Windows devices including Microsoft Surface Pro, Windows phones and PC's.

WWW.7IM.CO.UK

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Seven Investment Management

jemma.jackson@7im.co.uk

0203 823 8696

07776 204 610

Justin Urquhart-Stewart

Head of Corporate Development & Co Founder

Seven Investment Management

justin.urquhart-stewart@7im.co.uk

020 3823 8700