

FOR IMMEDIATE RELEASE

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7IM and ABSTRACT scoop top award for cutting edge cultural transformation programme

7IM and its training partner, ABSTRACT, have won the coveted Gold Award for External Learning Solution of the Year at the 2021 Learning Awards, which took place on Thursday 18th February.

The awards are in their 25th year and were hosted by Claudia Winkelman with Microsoft as their headline sponsor. Created to recognise innovation and achievement in workplace learning. The Learning Awards attract entries and sponsorship from some of the biggest names in business.

Taking home the Gold Award, the partnership between 7IM and ABSTRACT was praised for building on the solid foundations of 7IM's heritage, to create a modern business ready for today's social objectives and fit for the future.

7IM's cultural transformation programme known as the 'Succeeding Together programme' has been underway for 18 months, and the latest staff survey showed continued improvements in several key areas, including performance, recognition, and line manager relationships. In addition, increased development opportunities are getting very promising responses from staff.

7IM's Chief People Officer, Kate Hughes, summed it up perfectly with her acceptance speech: "Thank you for the recognition that our Succeeding Together programme has been something special. 7IM and Abstract came together to deliver the vision of our CEO, Dean Proctor. This vision was to create an environment where our colleagues understood and valued their role in delivering an unrivalled experience to our clients and each other.

"We started as an army led by generals. We moved to a family led by parents and now we are a high performing team lead by coaches.

"This programme is now a way of life for our colleagues and together we have changed our working lives for the better and will continue to do so. This is succeeding together at its best!"

7IM CEO, Dean Proctor, added: "ABSTRACT really are experts in this space. They designed and delivered this pivotal cultural transformational programme involving a variety of engaging and innovative modules. The change in the business has been remarkable already. And, with ABSTRACT, we have absolutely nailed our strategic partnership and the plan for 2021 is extremely exciting".

ABSTRACT CEO, Andy Nicol, added: "The partnership between 7IM and ABSTRACT has been extraordinary in terms of the mutual commitment, collaboration and dedication. I take my hat off to Dean Proctor and his Executive Team for retaining the importance of this programme in the face of the pandemic and having the courage and conviction to stay true to their vision. The results really do speak for themselves."

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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 £17bn, 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

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.**

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- 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**.
- 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.