

FOR IMMEDIATE RELEASE

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## **7IM LAUNCHES NEW MANAGED INVESTMENT SERVICE FOR ADVISERS WHILST ENHANCING ITS MODEL PORTFOLIO SERVICE AND DISCRETIONARY MANAGEMENT SERVICE.**

- Advisers can contact [BDMSupportTeam@7im.co.uk](mailto:BDMSupportTeam@7im.co.uk) or call 020 7760 8829 for more information

**Seven Investment Management (7IM)** has expanded its adviser offering, launching a new **Managed Investment Service** whilst enhancing both its **Model Portfolio Service (MPS)**, which turned five this year, and its full service Discretionary Management Service.

### **Three adviser services, three different approaches...**

#### **The 7IM Model Portfolio Service**

The 7IM Model Portfolio Service turned five this year, and has demonstrated excellent performance over that time, and at market leading low cost for an MPS. The number of asset classes within the models has now been greatly expanded to include alternative investments, aligning them more closely with the 7IM funds range. 7IM has also enhanced the MPS client reporting to give even more transparency and explanation of what is happening in the portfolios, to the benefit of both clients and their advisers. The 7IM Model Portfolios are mapped to all the leading risk profilers including Finametrica, Dynamic Planner, eValue and many others.

The 7IM Model Portfolio Service is available through: 7IM Platform, Alliance Trust Savings, ARC, Ascentric, AVIVA, Fusion Weath, James Hay, Novia, Nucleus, Standard Life, Transact, Wren Sterling and Zurich.

The new **7IM Managed Investment Service**, launched this month, is for advisers who want the services of a discretionary fund manager (DFM), but don't necessarily want the DFM to meet with the end client. Clients benefit from 7IM's global, active asset allocation driven approach and whole of market underlying holdings, including actives, passives and alternatives implementation, and all with active currency management. 7IM remains in the background: creating, managing and maintaining client portfolios, and giving advisers more time with their clients.

**Robert Poulten, Head of Business Development for 7IM** said: "Many advisers tell us they want to access 7IM's strategies but with full control of their client relationships, whilst maintaining ongoing responsibility for suitability. This new service allows advisers to do just that: drawing on 7IM's experience, expertise and resources to tailor bespoke investment proposals, and with support on tax allowance optimisation, and ongoing due diligence."

The **7IM Discretionary Management Service** has also been significantly enhanced, now with the choice of unitised or segregated portfolios, and with developments to its Manager Selection Service where client portfolios can be further enhanced with other complementary, high quality fund managers, fully researched by 7IM, and blended into the bespoke client portfolios, but with unified client reporting.

The **7IM Managed Investment Service, Model Portfolio Service and full Discretionary Management Service** have all recently been awarded an RSMR Discretionary rating, one of just a handful of DFMs to do so.

**Robert Poulten** continued: “All advice firms have different proposition and service models. These new discretionary service enhancements give the widest choice of DFM configuration to suit an advisers business and their clients. Whether the adviser wants us to meet their clients or not, provide administration support or not, wants segregated or unitised portfolios, onshore or offshore investment solutions, onshore or offshore custody, and a platform/ custodian of their choice – 7IM has the DFM solution that fits with their requirements.”

**Ends**

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**Notes to editors**

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