

1 AUGUST 2017

## 7IM'S APP 7IMAGINE LINKS UP WITH INTELLIFLO'S INTELLIGENT OFFICE

- **Systems integration helps financial advisers plan clients' cash flows**

**Seven Investment Management (7IM)** today announced that the award winning app, 7IMagine, is now integrated with Intelliflo's Intelligent Office, providing advisers with the ability to connect their clients' personal and financial information in minutes into 7IMagine removing the need for rekeying.

All details of a client's family, any properties held, as well as any financial or physical assets will be systematically loaded into 7IMagine to enable the use of My Future, the cashflow planning tool embedded in 7IMagine. Any information is flagged so that additional figures added by the adviser and client are clearly distinguished. Subsequent reviews of the plan will allow the adviser to refresh and update the data from Intelliflo ensuring the cash flow plan reflects the most up to date personal and financial details.

**Verona Smith, Head of Platform, Seven Investment Management (7IM)** said: "Cash flow planning is increasingly being recognised as a really effective way to introduce clients to the benefits of financial planning. With state retirement ages changing, expected longevity under scrutiny and people's finances becoming increasingly complex due to a plethora of pension and saving schemes and ISAs, it's no surprise that people struggle to keep on top of their retirement investments. Cash flow modelling is an important way to engage clients with their portfolios and help them gauge how close they are to reaching their goals.

"A recent [pension survey](#) commissioned by 7IM determined that some 35% don't think they're saving anything and 15% are unsure of what their position is. A further one in ten stated that they don't understand enough about pensions and it's paralyzing any financial planning.

"People are put off by the way we operate as an industry. We've done too little to help advisers and their clients get a handle on investments and savings in an engaging way. We all appreciate that technology can help people get to grips with their money. That's why we're committed to the continued development of 7IMagine – innovation that's continuing."

Nick Eatock, Intelliflo's Executive Chairman, said: "Intelligent Office is structured to enable integrations that make a real difference to the day-to-day work carried out by advisers, creating efficiencies that free up time, improve accuracy and speed up processes. This integration with 7IM is an excellent example of how we can work with our provider partners to make a real difference to the user experience."

With over 17,000 users, Intelligent Office is the most widely used practice management software in the UK.

### **Other developments**

The option to enable client information to be transferred between Intelliflo and 7IMagine is accompanied by a series of other changes including clearer menu options, and the ability to link pension drawdown monies with inflation. Touch ID is also now available on Apple devices so that advisers and clients can immediately login to 7IMagine, with plans to launch this functionality on Android devices too.

The team behind 7IMagine are now working on enhancing My Future further with more functionality and flexibility providing advisers with additional tools and enhanced client reporting,

7IMagine won two more awards this July: Best Investment App in the Goodacre Systems in the City; and the FT Adviser Innovation Award.

**Ends**

**For further information, please contact:**

Martin Stott  
Bulletin PR  
Direct: 0115 907 8413  
Mobile: 07956 917978  
[martin.stott@bulletin.co.uk](mailto:martin.stott@bulletin.co.uk)

**Notes to Editors:**

### **About 7IM**

It all began in 2002, with seven of us in a basement establishing Seven Investment Management (7IM) because we couldn't find anywhere we wanted to invest our families' money. Our assets under management now stand at around £11bn (more than doubling since 2013), and we have moved from 'basement' to 'Bishopsgate' in the City of London. There are now around 240 of us.

### **Radical common sense**

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.** Some of these risk profiles have an offshore version of the fund.

- 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 when we have the freedom to choose it. Asset allocation is actively managed. Again, there are different funds for different profiles: **7IM Adventurous, 7IM Moderately Adventurous, 7IM Balanced and 7IM Moderately Cautious.** Again, some of these risk profiles have an offshore version of the fund.
- We also have a selection of funds designed to meet specific needs, such as the **7IM Personal Injury Fund, the 7IM Unconstrained Fund** or the SRI focussed **7IM Sustainable Balance Fund.**
- We also have a range of ‘smart passive’ funds known as the equity value funds. The range includes: the **7IM UK Equity Value Fund, the 7IM US Equity Value Fund, the 7IM European (ex. UK) Equity Value Fund** or the **7IM Emerging Markets Equity Value Fund.** These are entirely systematically managed based solely on company fundamentals, the aim being to outperform the relevant passive market cap-weighted alternative by selecting profitable, high quality, cash flow generating companies that trade at a discount to their intrinsic value.

## **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. Like the Asset Allocated Passive (AAP) funds, the entire asset allocation is fulfilled with ‘smart passive’ market cap weighted passive instruments (for example UK and US equities) which track those markets and systematic instruments. 7IM undertake the due diligence on the passive securities (such as counterparty risk and concentration). 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.**

The 7IM funds and Model Portfolios are available through the 7IM Discretionary, Managed Investment, Platform, and Self Invest services, 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. Member of the London Stock Exchange. Registered office: 55 Bishopsgate, London EC2N 3AS. Registered in England and Wales No. OC378740.

[www.7im.co.uk](http://www.7im.co.uk)

## **About Intelliflo**

Intelliflo ([www.Intelliflo.com](http://www.Intelliflo.com)) has been providing information technology services to financial services companies since its formation in 2004. Its leading web-based practice management software, Intelligent Office, is the most widely used by new UK financial advisers\* and helps financial businesses large and small to improve efficiency and increase profits. Intelligent Office supports over 1,900 firms and 17,000 users with assets under advice of £279 billion (as at 1 July 2017). Intelliflo was named Best Technology Provider 2017 at the Professional Adviser Awards and Best Back Office System 2017 by Professional Paraplanner magazine. ISO27001 accreditation assures advisers that their data is safeguarded within a high quality security management framework.

In July 2013 HgCapital, a leading European private equity investor in B2B technology companies, became a majority shareholder in Intelliflo Ltd. HgCapital has a wealth of expertise in developing web-based software businesses and is committed to supporting the next phase of Intelliflo’s growth.

\*Based on number of directly authorised financial advice firms registered in 2016