



FOR IMMEDIATE RELEASE

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7IM AND SANLAM PARTNER IN ONSHORE BOND LAUNCH

Sanlam and **Seven Investment Management (7IM)** have partnered on a new launch, the **Sanlam Onshore Bond**. This has been created by **Sanlam** for the **7IM Platform** in response to adviser demand.

Together Sanlam and 7IM are launching an onshore bond which is very different from what is available through the vast majority of providers. Critically advisers will not be limited to using insured funds only.

Verona Smith, Head of Platform, 7IM said: "This new launch is a much anticipated product wrapper for advisers using the 7IM platform, and fills a much needed gap in the market. This is the first time we have been able to add an onshore bond to the platform, the challenge historically being that most onshore bond providers only allow access to insured funds. We have enjoyed working with Sanlam on this important new product launch.

"In the spirit of the 7IM platform the **Sanlam Onshore Bond** is open architecture to ensure that a firm's centralised investment proposition could be supported within the bond, and we are really excited to bring this to the platform."

Jonathan Polin, Group Chief Executive Officer, Sanlam said: "We are delighted to be partnering with 7IM. Together we have developed a simple, innovative solution which will support financial advisers and help meet the increasingly complex requirements of their clients. In particular, for those advisers looking for onshore options, this solution gives individuals the opportunity to pass on their wealth through the generations, in a tax efficient, onshore trust environment.

"We are one of only a small number of firms in the market that can provide these kind of bond structures, making the 7IM offering highly differentiated. Our partnership with 7IM reflects the progressive nature of our business and our steadfast commitment to providing a superior service for financial advisers and their clients."

The policy

The **Sanlam Onshore Bond** can invest in authorised and regulated collective investment schemes.

Charges (in addition to standard 7IM Platform costs and underlying product charges):

0.25% on first £100,000

0.20% between £100,001 - £500,000

0.15% between £500,001 - £1,000,000

0.10% on the value over £1,000,000

Minimum investment: £5,000

Additional top up: £1,000

Ends

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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 £12bn (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

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.

- 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 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

About Sanlam

Sanlam Limited is an international financial services group with a listing on the Johannesburg Stock Exchange and a market capitalisation of £7 billion. Established in 1918, the group provides a range of services to over 10 million clients globally, including insurance, financial planning, investments and wealth management.

Sanlam UK is led by CEO Jonathan Polin. The firm consists of a number of long established businesses, including:

- Sanlam Private Wealth: The discretionary fund manager with £2.7 billion of client assets under management
- Sanlam Investments & Pensions: The life and pensions business with in excess of £2.7 billion of assets under administration
- Sanlam FOUR: The boutique asset management and fund business which manages over £5.9 billion in both single strategy and long only funds and specialist multi-asset solutions.
- Sanlam Wealth Planning: The national financial adviser with nearly £2 billion of client assets under advice and 60 UK-based advisers
- In total, the firm has over £13 billion of assets under management or influence
- Sanlam UK attained its size, strength and reputation by leveraging the benefits of having a large secure South African parent company while focussing on individual client service delivered locally in the UK.

www.sanlam.co.uk