

FINANCIAL ADVISERS ONLY // JUNE 2023

The 7IM Model Portfolio Service is suitable for clients who:

Are a retail client



Have capacity for loss



Have an investment horizon over the medium-to-long term (five years+)



Have an FCA Regulated financial adviser

The 7IM Model Portfolio Service is not suitable for those who:

Have a risk profile that is not aligned with that of the model portfolio



Cannot bear loss of capital



Have a short-term view to investments (less than five years)



Do not have a financial adviser

Accessing the 7IM Model Portfolios:

The Model Portfolio Service is available on a number of advisory platforms and can be accessed via various product wrappers, depending on the platform, such as:

Investment Account • ISA • JISA • SIPP • Bond



The 7IM Model Portfolio Service provides model portfolios suitable for investors with varying degrees of risk appetite, from low risk 'Cautious' models to high risk 'Adventurous Plus' models. The client's risk profile should be aligned to the chosen model.

You can find more information on our model portfolios on the following pages.

You should be aware that the value of investments may go up and down and you may receive back less than you invested originally.



TARGET MARKET INFORMATION

7IM MODEL PORTFOLIO SERVICE

FINANCIAL ADVISERS ONLY // JUNE 2023

7IM Active Model Portfolios

Investments

Active securities

Risk profiles

Cautious
Moderately Cautious
Balanced
Moderately Adventurous
Adventurous
Adventurous Plus

Other

Suitable for investors in pursuit of active management

How can I access the Active model portfolios?

7IM Platform
7IM Discretionary Service
Third-party platforms

7IM Responsible Choice Model Portfolios

Investments

A blend of active and passive securities, all of which must satisfy certain ESG-related criteria

Risk profiles

Cautious
Moderately Cautious
Balanced
Moderately Adventurous
Adventurous

Other

Suitable for investors in pursuit of ESG strategies

How can I access the Responsible Choice model portfolios?

7IM Platform
7IM Discretionary Service
Third-party platforms

7IM Blended Model Portfolios

Investments

A blend of active and passive securities

Risk profiles

Cautious
Moderately Cautious
Balanced
Moderately Adventurous
Adventurous
Adventurous Plus

Other

Suitable for investors looking for active management but with costs controlled using a blend of active and passive securities.

Income model portfolio also available, with a balanced risk profile

How can I access the Blended model portfolios?

7IM Platform
7IM Discretionary Service
Third-party platforms

7IM Passive Model Portfolios

Investments

Passive securities

Risk profiles

Cautious
Moderately Cautious
Balanced
Moderately Adventurous
Adventurous
Adventurous Plus

Other

Suitable for investors looking for a lower-cost portfolio with no active, tactical asset allocation

How can I access the Passive model portfolios?

7IM Platform
7IM Discretionary Service
Third-party platforms

www.7im.co.uk

Seven Investment Management LLP is authorised and regulated by the Financial Conduct Authority. Member of the London Stock Exchange. Registered office: 1 Angel Court, London EC2R 7HJ. Registered in England and Wales number 0C378740.