

FOR IMMEDIATE RELEASE

9 December 2019

7IM Co-founder Justin Urquhart Stewart moves to ambassadorial role

7IM has today announced that Justin Urquhart Stewart is to take on a new ambassadorial role from January 2020 as he decides to retire and step down from his full-time position with the firm.

In his new role, Justin will continue to represent the firm both as an ambassador and adviser to the business.

As one of the original founders who set up the firm in 2002, Justin has helped grow 7IM from a fledgling investment management company into the innovative and diverse firm it is today. Today 7IM employs 300+ staff and has over £14bn of assets under management, offering investment services to both the intermediary and private client markets.

During this time, Justin has helped launch myriad pioneering investment solutions and services including: the first multi-manager funds in the market, 7IM's innovative AAP passive multi asset funds, the award-winning 7IMagine app and more recently 7IM's Retirement Income Service as well as 7IM's ultra-low cost Pathway Model Portfolios. Justin has also been instrumental in expanding 7IM's presence in Scotland with the acquisition of TCAM in 2018.

Justin Urquhart Stewart said: "Over the last two decades it has been a great privilege to watch 7IM grow from an idea to a dynamic business looking after over £14bn worth of assets for its clients. As I take this next step, I do so in the comfort of knowing we have a highly capable and experienced senior management team in place who will be able to take the business forward.

"I'm delighted and privileged to be continuing to work with the firm in an ambassadorial role, and am excited to see Dean and the wider team write the next chapter of 7IM's history."

Dean Proctor, CEO, 7IM, commented: "Justin has been instrumental in building 7IM into the multi-faceted business it is today. We are incredibly appreciative for everything Justin has done and will continue to do for 7IM.

"Justin is one of the most respected and recognised industry figures so we are delighted that we are still able to retain his knowledge, expertise and counsel within the business.

PRESS RELEASE

“His advice will be pivotal as we continue to grow and innovate, and we have invested in bringing fresh and diverse talent into the business, creating a new generation ready to step into Justin’s shoes – if not his red braces!”

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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 £14.3bn, 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.

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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 funds domiciled in both Dublin (with UK reporting status) as well as the UK.
- 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**. Again, some of these risk profiles have funds domiciled in both Dublin (with UK reporting status) as well as the UK.
- 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**.
- We also have a range of ‘smart passive’ funds known as the equity value funds. The range includes: the **7IM UK Equity Value Fund**, or the **7IM European (ex. UK) 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.

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, 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, 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.

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