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7IM partners with Cloud Direct to accelerate digital transformation and enhance the adviser and client experience

7IM today announces a new partnership with Cloud Direct as part of its multimillion-pound and multi-year investment in its award-winning proprietary platform and supporting technology. The partnership demonstrates 7IM's ongoing commitment to improving adviser and client experiences by providing advisers with a streamlined platform with rich functionality that allows them to focus on what matters most: building strong client relationships and developing sound financial plans.

Cloud Direct is one of the UK's leading Microsoft Partners with a proven track record of managing large-scale, regulated projects. It will work with 7IM to build new Cloud based infrastructure that will enable better scalability, whilst supporting growth and improve the overall experience for clients. The project ensures speedier delivery of new features and enhancements, the most recent being automated pension transfers and its innovative Online Reporting suite.

The partnership will strengthen 7IM's own cloud engineering capability and accelerate the delivery of its transformation programme - allowing the business to consistently roll out new enhancements and solutions to advisers and their clients at greater speed.

The implementation of new Microsoft technologies has also embedded additional security protocols and compliance measures to safeguard client data.

Beyond the technical benefits, the partnership also supports the upskilling of the 7IM team, ensuring they are equipped to deliver secure, fast-paced and high-quality systems that meet the evolving needs of advisers and clients.

Harriet Massie, Chief Transformation Officer at 7IM said: "Cloud Direct brings extensive experience in enabling businesses to move to and thrive in the Microsoft cloud environment. This partnership is more than a tech upgrade – it's a strategic investment in our people and platform to deliver tangible benefits for advisers and their clients. By modernising our infrastructure and embedding AI-driven capabilities, we're accelerating the delivery of intuitive tools that simplify reporting, enhance security and improve the speed and quality of service.

"Ultimately, this means advisers can spend less time on admin and more time building meaningful relationships with clients—confident that they're supported by a platform that's secure, scalable, and built for the future."

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Steve Price, Chief Revenue Officer at Cloud Direct, added:

“We are excited to partner with 7IM on its ambitious transformation journey. By combining our expertise in Microsoft cloud technologies with 7IM’s vision for delivering outstanding client experience, we are helping to ensure 7IM’s cloud-native platform maintains its innovative edge.

“This transformation strongly positions 7IM to drive faster innovation and more agile delivery, strengthening its competitive edge and ensuring consistently better outcomes for its customers.”

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Notes to Editors:

About 7IM

At 7IM, we want to deliver an unrivalled experience for all of our clients – whether that’s individuals, families, or businesses.

For financial advisers and planners, this involves us standing alongside them to support them with whatever they need, so they can focus more on what really matters: nurturing their relationships with clients to deliver on their financial plans. Our offering for advisers reflects that: an open architecture platform, multi asset investment solutions to fit whatever their investment philosophy is and help with discretionary investment management.

For our private wealth clients, it all starts with understanding the client, their families, and their goals and then creating a bespoke financial plan designed to help them achieve financial freedom.

We use cutting-edge technology to help make things simple and clear, but what really sets us apart is our real, honest, human service. No automated helplines or chatbots. You’ll always talk to a person.

Today, from our offices in London and Edinburgh, our team of approximately 800 talented people are entrusted to manage over £23 billion (as at 31 August 2025) for a range of clients, including individuals and families, financial advisers, corporates, charities, and trustees.

In January 2024, Ontario Teachers’ Pension Plan, a global investor with net assets of \$255.8. billion (as at June 30 2024), acquired a majority stake in 7IM.

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