PRESS RELEASE

FOR IMMEDIATE RELEASE **15 JULY 2025**

7IM PRIVATE CLIENT EXPANDS FINANCIAL PLANNING TEAM WITH TWO ASSOCIATE DIRECTORS IN SCOTLAND

7IM Private Client has strengthened its presence in Scotland with the appointment of Angus Robertson as Associate Director, Financial Planning, and the promotion of Morgan Leask to Associate Director.

Angus joins from St. James's Place, where he served as a Financial Adviser, supporting over 200 clients with their investment, pension, and protection needs. At 7IM, he will manage a portfolio of high-net-worth clients—including individuals, families, and businesses—delivering tailored financial and wealth management advice to help them achieve their long-term goals.

Morgan has been promoted from her role as a Technical Paraplanner, having joined 7IM as a Trainee Paraplanner while studying for her professional qualifications. She previously worked as a Client Manager at Murphy Wealth. In her new role, Morgan will also manage a portfolio of clients, providing comprehensive financial planning services.

Ben Covey, Managing Director, 7IM Private Client said: "Investing in our client relationship teams is essential as we aim to build lifelong relationships to support people on their financial journeys.

“We're thrilled to welcome Angus to the business. He brings valuable experience and expertise. We also congratulate Morgan on her well-deserved promotion. Since joining 7IM in 2022 she has made a fantastic contribution to the team.

“These appointments mark a period of strong momentum for our business and, in particular, reinforce our commitment to Scotland. This is reflected in our close partnership with our sister company, Partners Wealth Management, which recently acquired Johnston Carmichael Wealth—one of Scotland's leading financial planning firms. Together, we're deepening our presence in the region and strengthening our ability to deliver exceptional financial planning services across the UK.”

Angus Robertson, Associate Director, Financial Planning said: “I am delighted to be joining 7IM's Private Client business at an exciting time and look forward to contributing to the firm's ambitious growth plans. The business's strong commitment to clients is evident in the way it supports its team, empowering them to deliver exceptional service.”

Morgan Leask, Associate Director, Financial Planning, added: “Having held multiple roles within the business, I've gained a deep appreciation for how our teams collaborate to deliver a seamless client experience. I'm proud to be part of a team and wider business that invests in professional development and its people, and prides itself on service excellence.”

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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 600 talented people are entrusted to manage over £24 billion (as at January 2024) 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.

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. Registered office: 1 Angel Court, London EC2R 7HJ. Registered in England and Wales No. OC378740

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