

PRESS RELEASE



FOR IMMEDIATE RELEASE

29 June 2021

7IM appoints Kris Barclay as Head of Private Clients in Edinburgh

Kris Barclay has joined 7IM as Head of Private Clients, Edinburgh, bringing more than 20 years of industry experience to the role.

Barclay will be responsible for leading 7IM's Private Client proposition in Edinburgh and Scotland as well as continuing to work directly with clients. Barclay will also work closely with Colin Rowe, Managing Director of Private Clients, to use his deep local knowledge and experience to further build 7IM's presence and proposition in the region.

He joins from Charles Stanley where he started eight years ago in the Edinburgh office, helping to grow both the investment and financial planning functions, as well as going on to set up and manage a new Glasgow office for the firm. He brings extensive experience dealing with professional intermediaries and high-net-worth clients. Prior to Charles Stanley, he started his career and spent 14 years at what is now Brewin Dolphin in Edinburgh.

Barclay's appointment follows a number of new hires for 7IM across Scotland.

Last month the firm added two new additions to its Private Client team within the Edinburgh office as it continues to grow in the Scottish market.

Colin Rowe, Managing Director of Private Clients at 7IM, said: "Kris's experience and insight will be invaluable as we continue to grow our presence and capabilities across Scotland.

"He has a close understanding of clients' needs and the broader industry, alongside a reputation as a trusted practitioner, with a keen sense of how to accelerate growth in different markets."

Barclay added: "This is a great opportunity to join a rapidly growing business, which offers clear and significant value for its clients. The attractive ownership structure and fresh faces on the board show 7IM continues to go from strength to strength, and gives me great confidence in the results we can deliver."

Ends

For further information, please contact:

Henry Chan
Head of Communications & Content
Seven Investment Management

PRESS RELEASE



Henry.Chan@7im.co.uk
0203 823 8696
07786 000 313

Adam Walmsley
PR & Social Media Manager
Seven Investment Management
Adam.Walmsley@7im.co.uk
0203 823 8727
07790 655 584

Notes to Editors:

About 7IM

It all began in 2002, with seven of us in a basement establishing 7IM because we couldn't find anywhere we wanted to invest our families' money. Our assets under management now stand at around £14bn, 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.

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,

PRESS RELEASE



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**.

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**.

In 2019, we launched **7IM Pathway**, a diversified range of passive multi asset model portfolios underpinned by our robust Strategic Asset Allocation (SAA) process. The Pathway Model Portfolios differ from our traditional offering and are built purely using a streamlined version of 7IM's robust (SAA).

The 7IM funds and Model Portfolios are available through the 7IM Discretionary and Platform 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.