

PRESS RELEASE



FOR IMMEDIATE RELEASE

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7IM APPOINTS CHIEF INTEGRATION OFFICER TO ACCELERATE STRATEGIC GROWTH

7IM today announces the appointment of Nick Allen as Chief Integration Officer, effective immediately. This newly created role reflects 7IM's continued investment in delivering on its vision of providing an unrivalled experience as the firm executes its ambitious growth strategy—underpinned by both organic and inorganic expansion.

Allen possesses over 30 years of experience in financial services and joins from Schroders Personal Wealth, where he was Chief Operating Officer. Prior to this, he held a number of senior leadership roles, including Chief Operating Officer, Group Transformation at Lloyds Banking Group

Reporting directly to CEO Dean Proctor, Allen will play a pivotal part in the onboarding and harmonisation of recent and future acquisitions. In particular, he will drive alignment of propositions, capabilities and processes across the recently acquired firms to embed best practices and deliver a seamless and consistent experience for 7IM's clients.

Allen will also be responsible for exploring new and innovative solutions that can be integrated into 7IM's proposition and capabilities to drive better outcomes and experiences to clients.

Commenting on the appointment, Dean Proctor, CEO of 7IM, said:

"I'm delighted to have someone of Nick's experience and capabilities join 7IM and the executive team as we enter the next phase of our strategic growth plans.

"Nick has a proven track record in leading large business transformations in his roles at Schroders Personal Wealth and within the Lloyds Banking Group.

"His deep expertise will help us unlock synergies and greater scale, which will be critical as we continue on our growth journey and enhance the experience we deliver for our clients."

Nick Allen, Chief Integration Officer at 7IM, added:

"I'm excited to join 7IM at such a pivotal time. The firm has a clear vision, strong culture, and a genuine commitment to delivering outstanding client outcomes.

"Having led a number of complex transformation and integration programmes over the years, I understand how powerful it can be when people, systems, and processes all come together.

"I look forward to working with Dean and the team to support 7IM's growth and ambitions."

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For further information, please contact:

Henry Chan
Head of Corporate Communications
7IM
Henry.Chan@7im.co.uk
020 3823 8696
07786 000 313

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