

PRESS RELEASE



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7IM SIPP SURPASSES £7BN AUM

- *Milestone reflects growing popularity with an estimated 5.3 million people owning SIPPs in UK*
- *7IM data also reflects resurgence of guaranteed products, with 165% increase in demand for its market leading Secure Lifetime Income, in partnership with Just Group Plc*

7IM today announces that its Self-Invested Personal Pension (SIPP) has surpassed £7 billion in assets under administration. This marks a significant milestone as the business accelerates its growth plans and mission to provide unrivalled services to advisers and clients.

The £7 billion milestone comes amid rising demand for flexible retirement solutions, driven by pension freedoms and the shift of long-term saving responsibility from employers to individuals. [The Financial Conduct Authority](#) estimates that around 5.3 million people in the UK now hold a SIPP (2024), reflecting the growing popularity of these products.

7IM's own data also reflects the broader resurgence in annuities. The latest data from the ABI shows that pension annuity sales increased by 24% last year hitting a ten-year peak of 89,600 while the business has seen a 165% jump in clients utilising its Secure Lifetime Income (SLI) solution over the past year, delivered in partnership with Just Group Plc. SLI provides a guaranteed monthly income for life that is paid into the 7IM SIPP and can be taken as tax efficient income immediately or reinvested for a later date. 7IM's SIPP is one of few on the market to integrate a guaranteed income option, enabling advisers to create more sustainable and reliable yet flexible retirement plans.

The 7IM SIPP supports a wide range of retirement strategies, including UFPLS, tailored drip-feed drawdown and full or partial tax-free cash. These can be combined with the firm's Retirement Investment Strategy and access to more than 10,000 investment options, as well as the SLI solution. It also supports Junior SIPPs and pension drawdown for beneficiaries. While tax relief on pension contributions is pre-funded, helping to reduce administration for investors.

Consolidating pensions into 7IM's SIPP has been enhanced following the recent launch of automated transfers which is reducing processing times by up to 25%. Advisers can also monitor transfers in real time directly through the Platform supporting them with client communication.

Liz Paradine, Chief Operations Officer for 7IM said: "Reaching the £7 billion mark is a major milestone for the business and reflects the trust advisers and clients continue to place in us. With our SIPP we have created a proposition that gives advisers the flexibility they need to plan clients' unique retirement journeys. It's been designed to make savings work hard through the accumulation phase, while offering genuine choice and control when clients begin to draw on their pension in retirement.

"With further change on the pensions horizon, we are well placed to support advisers with the tools, solutions and technical expertise needed to navigate an increasingly complex retirement landscape."

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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