7IM app and portal user guide

Getting started, registering and finding your way around



Succeeding together

7IM

Capital at risk

Images in this document are for illustrative purposes only and not investment advice or guidance

Your investments can go down as well as up in value and you may get back less than you invest. If you are unsure about the risks involved or whether an investment is suitable for you, please speak to your financial adviser.

7IM APP & PORTAL USER GUIDE

Contents

Available at home or on the go	3
Register for access	4
Registering as a Client Member	7
Forgotten your password?	8
Frequently asked questions	10
Your family group view	11
Account level: Investment account	12
Account level: ISA	13
Account level: SIPP	14
Portfolio level and holdings	15
Holding level	16
Valuation history	17
Investment gain or loss vs performance	18
Performance and benchmarks	19
Assets	20
Settings	21
Profile	22
Documents	23
Frequently asked questions	24

Available at home or on the go

View your investments on your phone, tablet or computer, wherever you are.

On your phone or tablet

Download the 7IM app. Search for '7IM' in the App Store or Google Play.

Download on the **App Store**

Get it on **Google Play**

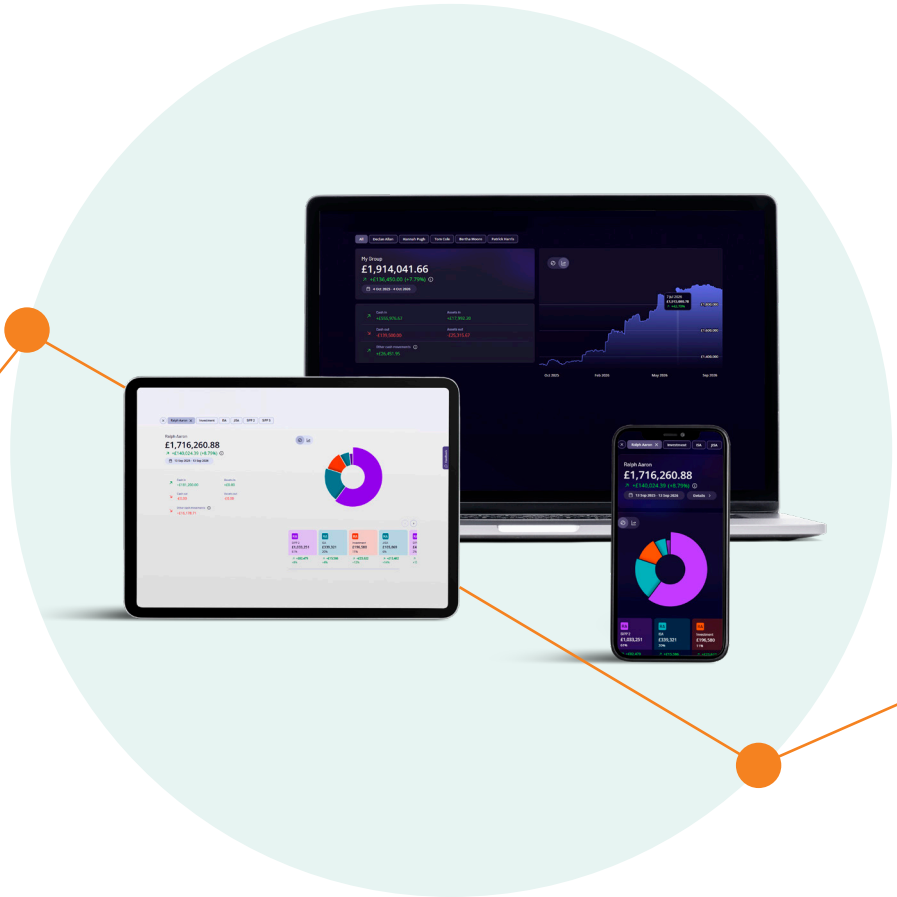
On your computer

Go to **clients.7im.co.uk** or use the portal link in your 'Welcome letter' to log in or register.

What you'll need

Make sure you have the following on hand to access the app and portal for the first time:

- Access to the email address you've given us
- Your mobile phone (or landline) to receive a security code
- Your client reference number (in your 'Welcome letter') or National Insurance number



Details changed?

If your email address or phone number has changed, speak to your adviser or your 7IM Investment Director if you have one.

Register for access

Create your login by verifying your email address.
You only need to do this once.

01 **Register**

On the Welcome screen, select ‘Register’.

02 **Enter your email**

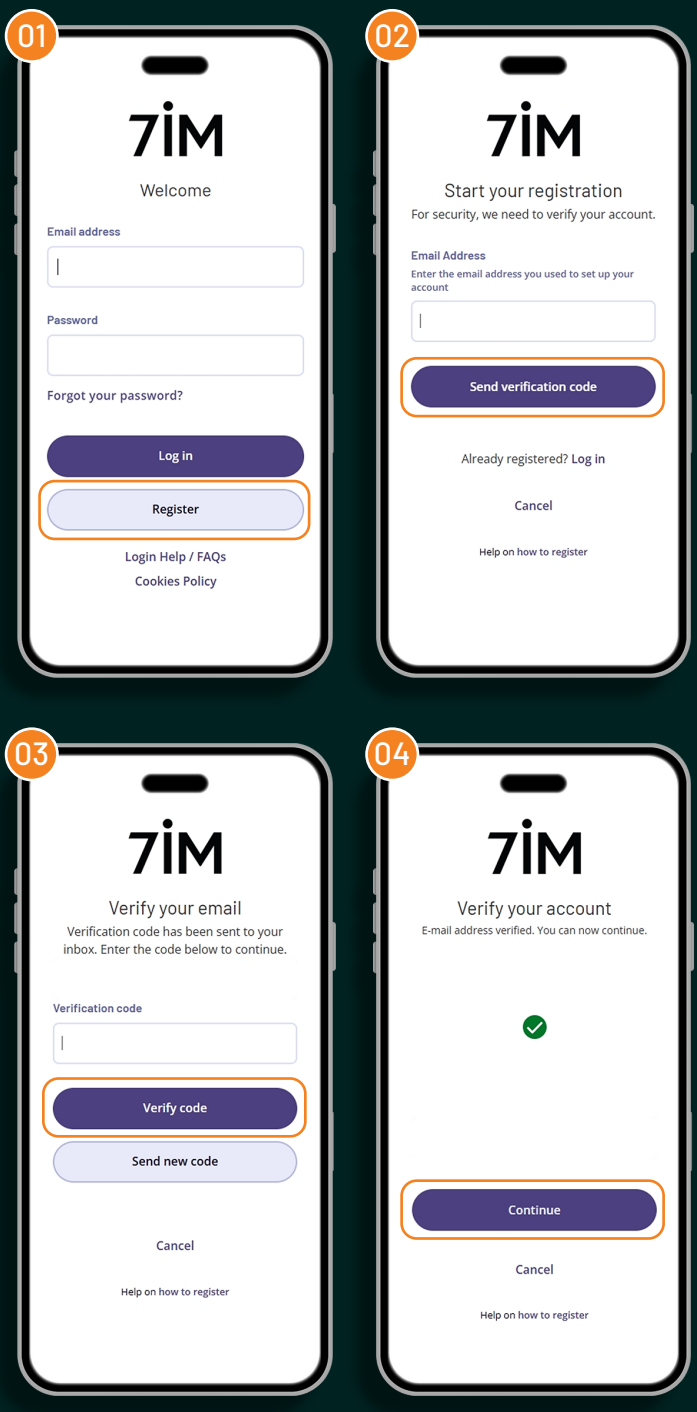
Enter the email address you’ve given us and select ‘Send verification code’.

03 **Verify your email**

Enter the code we email you and select ‘Verify code’. Can’t see it? Check your junk or spam folder.

04 **Email verified**

Your email address is verified. Select ‘Continue’.



05

Create a password

Choose a password of at least 15 characters. Enter it twice, then select ‘Save password’.

06

Add your phone number

Enter the mobile number you’ve given us, then select ‘Send code’ or ‘Call me’. If you choose ‘Call me’, press the # key when asked to press the pound key.

07

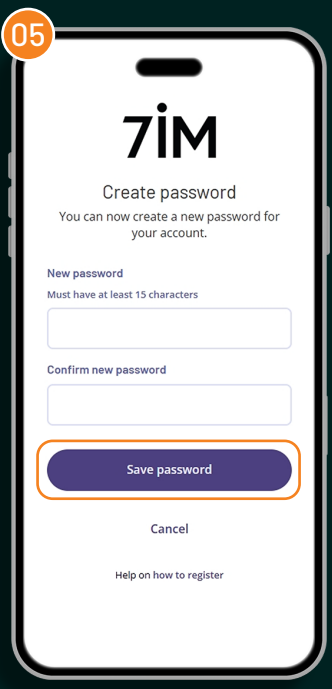
Verify your phone

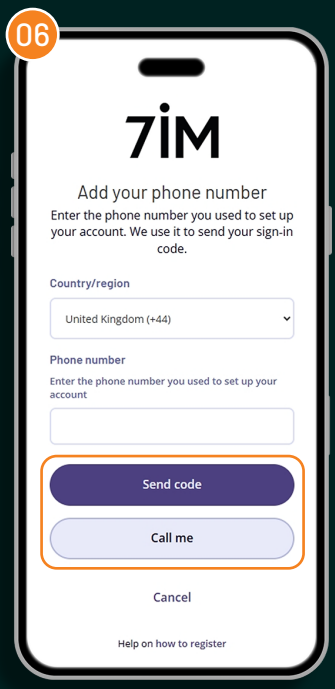
Enter the code we text you and select ‘Verify code’. Nothing arrived? Select ‘Send new code’.

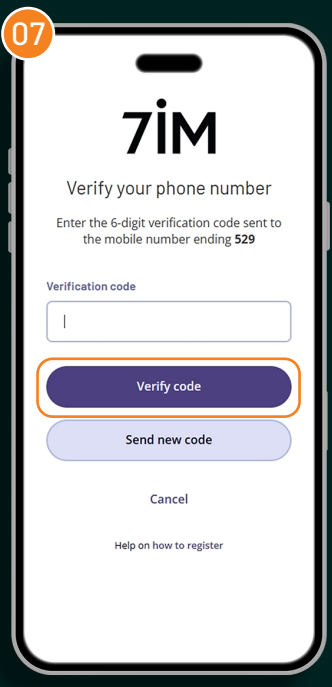
08

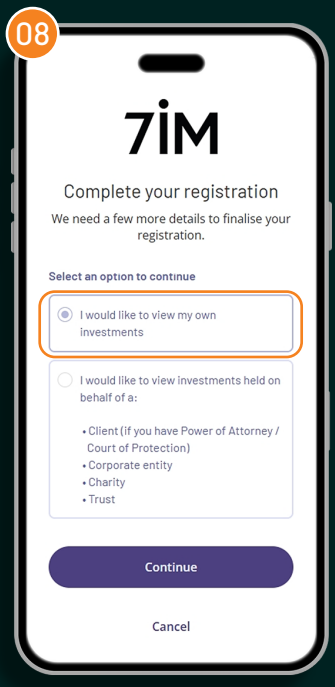
Choose who you are

Select I would like to view my own investments, then select ‘Continue’. Viewing for someone else? See Client members on page 7.









Need help?

Call Client Support on 020 7760 8707, Monday to Friday, 8:30am to 5pm.

09

Confirm your details

Enter your last name, date of birth and client reference number. Don't have it to hand? Use your National Insurance number instead, then select 'Submit'.

10

Turn on biometrics

Using the app? Select 'Enable Biometric login' to log in quickly and securely with your face or fingerprint, or select 'Not now'.

11

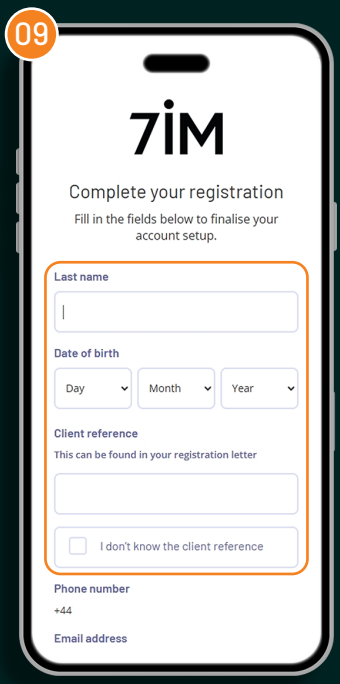
Accept our terms

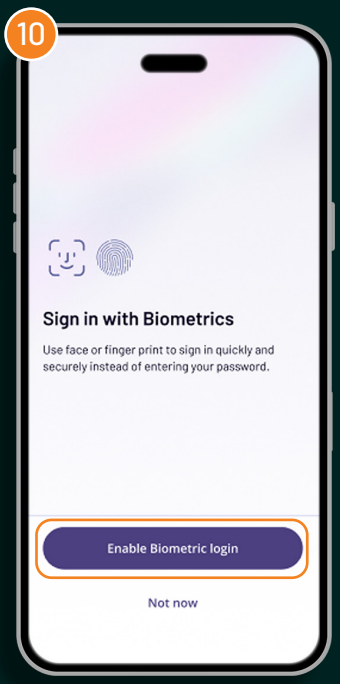
Review the key information, select the checkbox to accept our Terms & Conditions, then select 'Continue'.

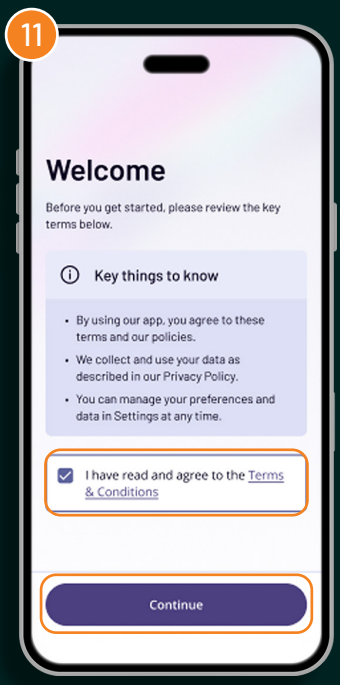
12

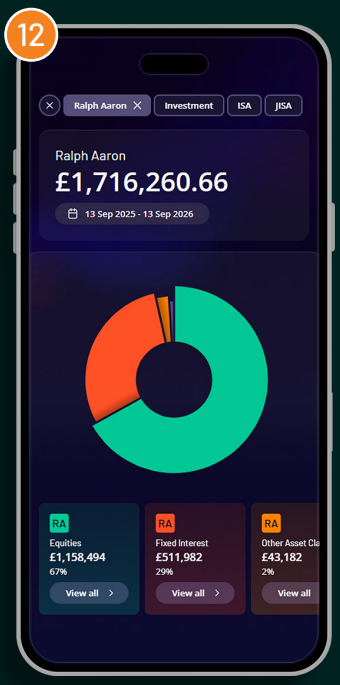
You're in!

You've now successfully registered and will be able to see your accounts.









Details don't match?

Your last name, date of birth and client reference or National Insurance number must match what we hold. If anything has changed, speak to your adviser, or your 7IM Investment Director if you have one.

Registering as a Client Member

This is an option for people who view investments on behalf of someone else, such as under a Power of Attorney or for a trust.

Who is a client member?

Someone who views investments held on behalf of a client, for example under a Power of Attorney or Court of Protection order, or for a company, charity or trust.

Choose the second option

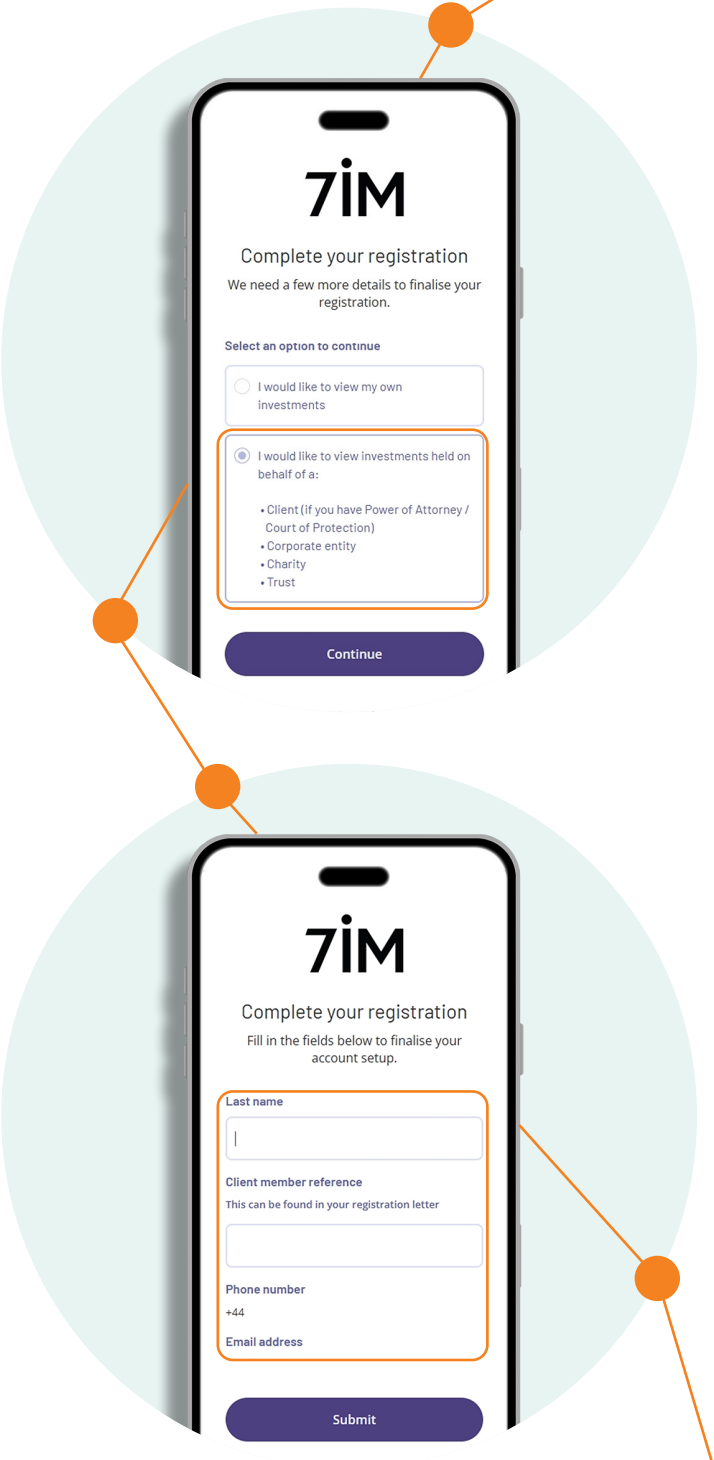
When asked, select 'I would like to view investments held on behalf of a', then 'Continue'.

Have these ready

Your last name, your client member reference (in your 'Welcome letter'), and access to the email address and mobile number you've given us.

Choose who to view

Once you're in, pick the client you want to view from your list. You can view one client at a time.



Forgotten your password?

Reset it in a few minutes using your email and phone.

01

Forgot your password?

On the Welcome screen, select 'Forgot your password?'

02

Verify your email

Enter the email address you've given us and select 'Send verification code'. Enter the code we email you, then select 'Verify code'.

03

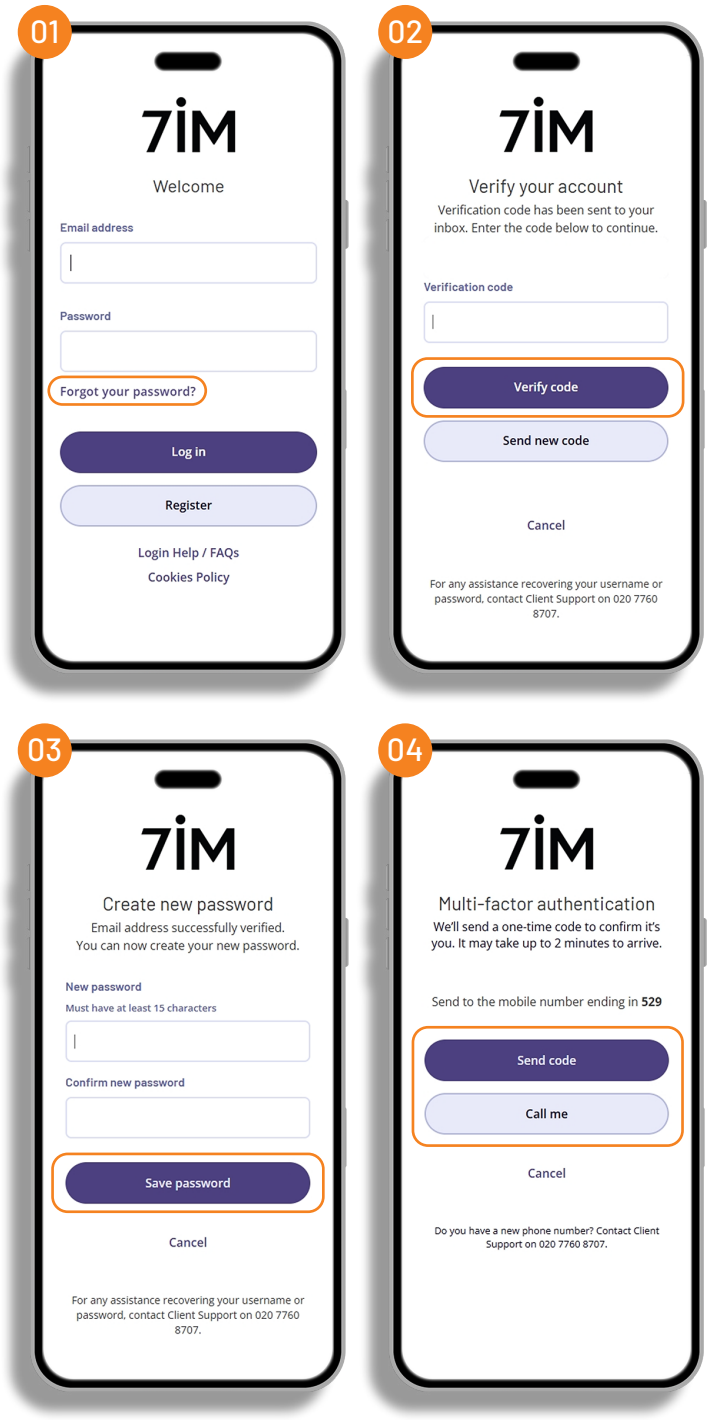
Create a new password

Enter a new password of at least 15 characters in both the 'New password' and 'Confirm new password' fields, then select 'Save password'.

04

Verify your phone

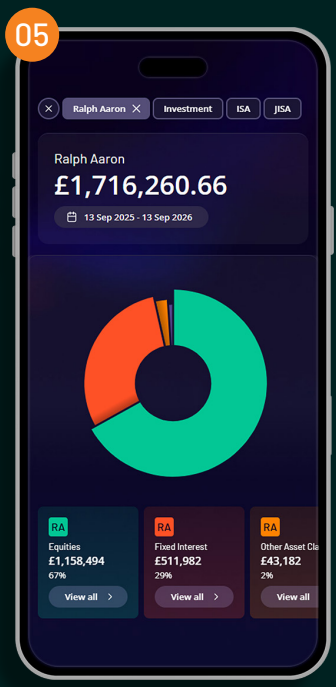
Select 'Send code' for a text, or 'Call me' for a phone call (press the # key when asked to press the pound key). Enter the code and select 'Verify code'.



05

You're in!

Your password is reset and you'll see your accounts.



Locked out?

After 10 incorrect password attempts your login is locked for 1 minute. Reset your password to get straight back in.

Frequently asked questions

Logging in and registering.



I used to have a login, but I can't log in or reset my password?

If you last logged in using a text message code on or after 8 March 2026, you can log in with your existing email and password. If not, please register again.



Can I update my email or phone number over the phone?

We can't take changes over the phone. Please speak to your adviser, or your 7IM Investment Director if you have one.



Can I share an email address or phone number with someone else?

Each person needs their own email address to register. Phone numbers can be shared, both landline and mobile.



I'm told my registration couldn't be completed. What should I do?

Check that your email, mobile number, last name, date of birth and client reference or National Insurance number match what we hold for you. Then log in with your email and password to finish setting up – don't register again. If you get stuck, call Client Support.



I haven't received my code. What should I do?

Email codes: check your junk or spam folder and use the newest code. If nothing arrives after 3 minutes, select 'Send new code'. Text codes: check you have mobile signal, or select 'Call me instead'.



What if I enter the wrong password too many times?

After 10 incorrect attempts, your login is locked for 1 minute. The quickest fix is to select 'Forgot your password?' and reset it.



How do I know the codes I am receiving are from 7IM?

We use Microsoft technology for our login and registration. Your emails will come from **msonlineservicestream@Microsoftonline.com**. Text messages will come from 'msverify', while phone calls to verify your number will come from +1 (855) 330-8653.

Your family group view

When you log in, you'll see everything together. Here are six key features to look out for.



01 **See your total value**

Your overall value and investment gain or loss for the dates shown.

02 **Choose who or what to view**

Select a person, Joint Wealth relationship or an account to see more. Select it again to go back.

03 **Choose your dates**

The date filter shows the last year (if available). Select it to pick another period or enter a custom date.

04 **See how your investments are split**

The cards and chart show the value of each person, account or portfolio, and its investment gain or loss.

05 **Use the menu**

Move between Valuation, Performance and Assets, or open your Profile and Settings.

06 **See it over time**

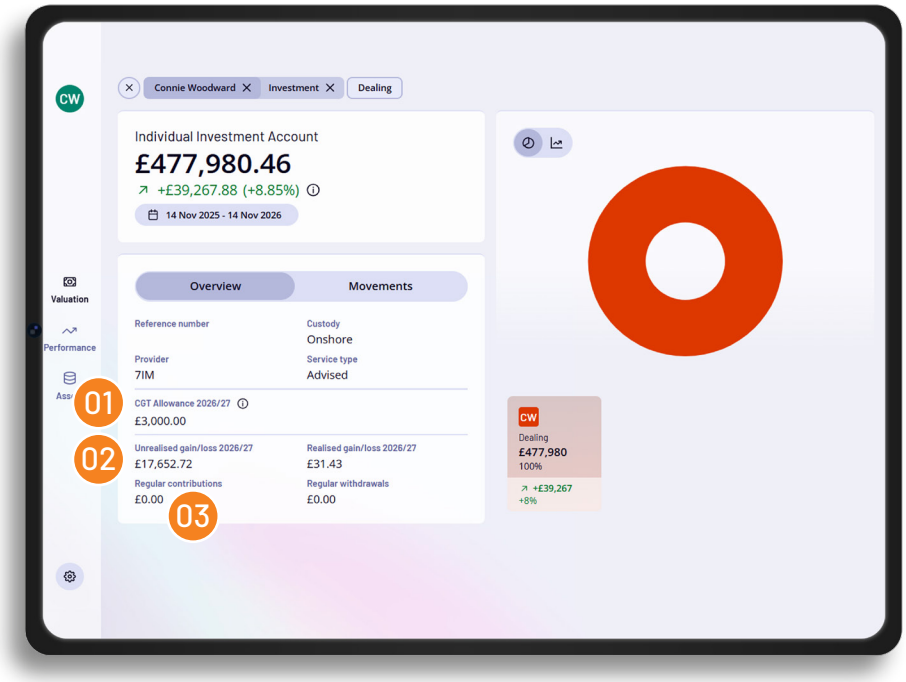
Use the toggle to switch to a chart of your valuation history.

One experience

The app and portal look and work the same. Your adviser sees the same information you do.

Account level: Investment account

Select an Investment account to see its value, investment gain or loss, capital gains and regular payments.



01 **Capital gains tax allowance**

Your capital gains tax allowance for this tax year.

02 **Realised and unrealised gains**

Gains you've made from selling investments (realised) and gains on investments you still hold (unrealised), for this tax year.

03 **Regular payments**

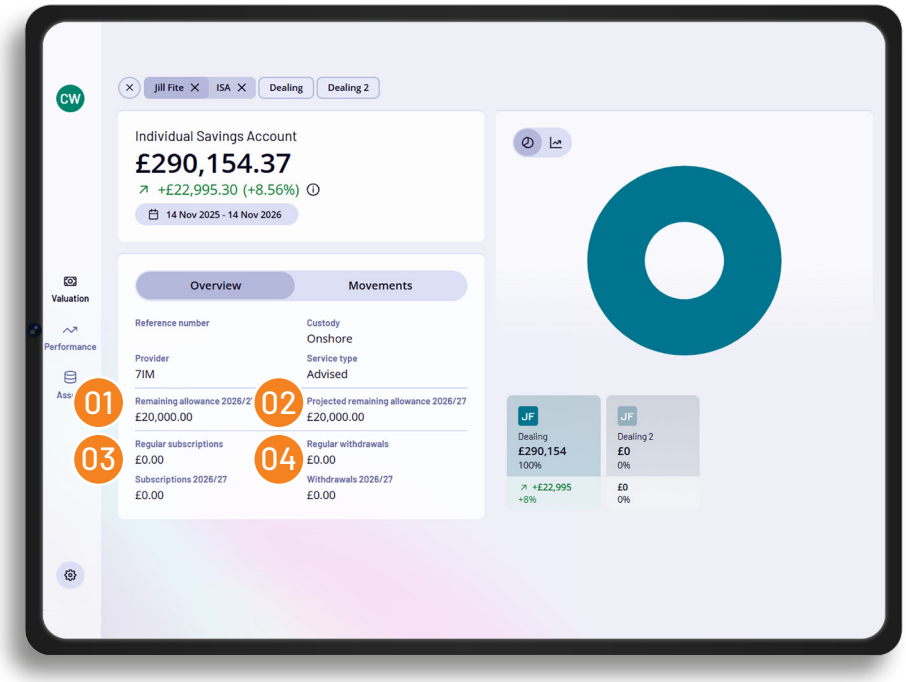
Your regular contributions and withdrawals, if you have these set up.

This tax year

Allowances, contributions and withdrawals are for the current tax year and always show the latest information, whatever dates you choose.

Account level: ISA

Select your ISA to see its value, investment gain or loss, allowance and regular payments.



01 **Remaining allowance**

How much of your ISA allowance you have left this tax year.

02 **Projected remaining allowance**

How much allowance you're projected to have left at the end of the tax year, based on your regular payments.

03 **Regular payments**

Your regular subscriptions and withdrawals, if you have these set up.

04 **Paid in and withdrawn**

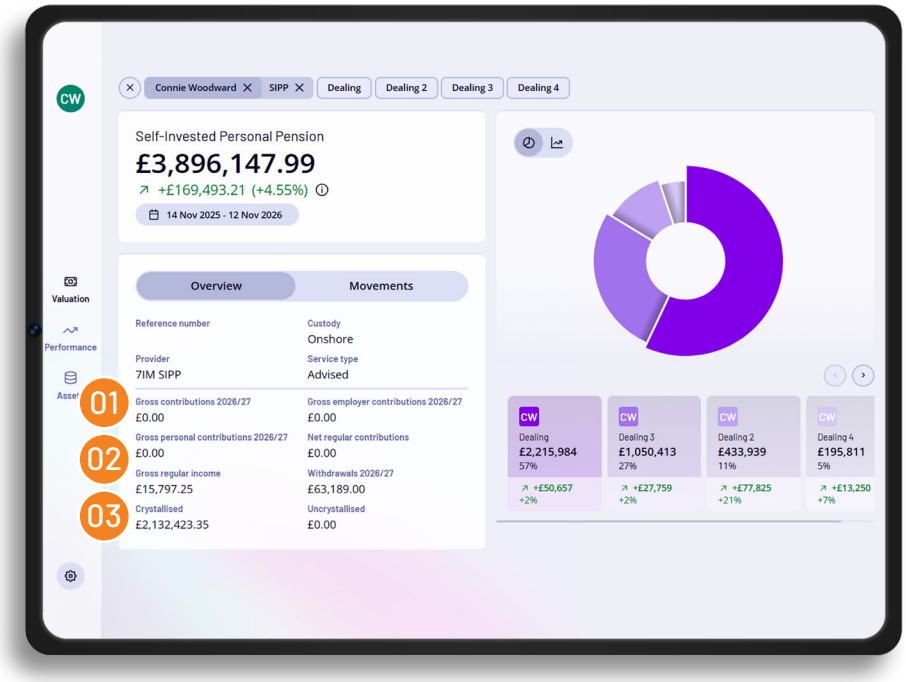
How much you've subscribed and withdrawn so far this tax year.

This tax year

Allowances, contributions and withdrawals are for the current tax year and always show the latest information, whatever dates you choose.

Account level: SIPP

Select your SIPP to see its value, investment gain or loss, contributions and withdrawals.



01

Contributions

Your gross contributions this tax year, including any from your employer.

02

Regular payments and income

Your personal and regular contributions, and any regular income and withdrawals, if you have these set up.

03

Crystallised and uncrystallised

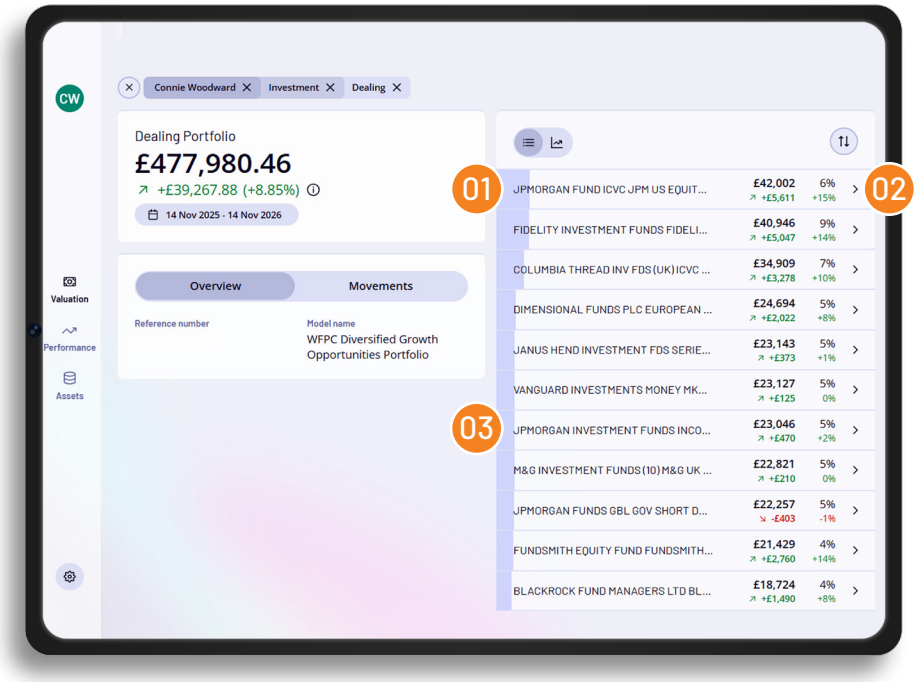
Crystallised is the part of your pension you've already started taking benefits from. Uncrystallised is the part you haven't.

This tax year

Allowances, contributions and withdrawals are for the current tax year and always show the latest information, whatever dates you choose.

Portfolio level and holdings

Select a portfolio to see every investment it holds.



01

Your holdings

Every investment in the portfolio, with its value, share of the portfolio and gain or loss.

02

See more

Select the arrow next to a holding to see units, price and total cost, plus its factsheet and PSD/ KIID where available.

03

Portfolio details

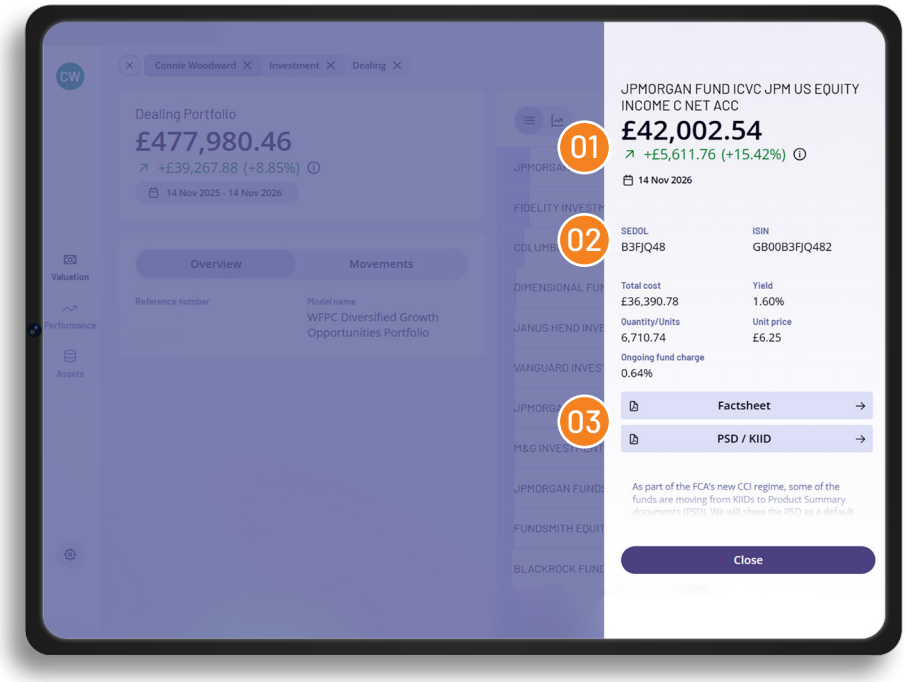
Your portfolio reference and your DFM model name, if you invest in one.

Two kinds of gain or loss

A holding's gain or loss is its value today minus what was paid for it (total cost). The portfolio's investment gain or loss only covers the dates you've chosen, and allows for money paid in or withdrawn so it isn't counted as a gain or loss.

Holding level

Select the arrow next to a holding to see more about it, including its documents.



01 **Value and gain or loss**

The holding's value on the date shown, and its gain or loss compared with what was paid for it.

02 **Holding details**

Its SEDOL and ISIN (codes that identify the fund), total cost, yield, number of units, unit price and ongoing fund charge.

03 **Factsheet and PSD / KIID**

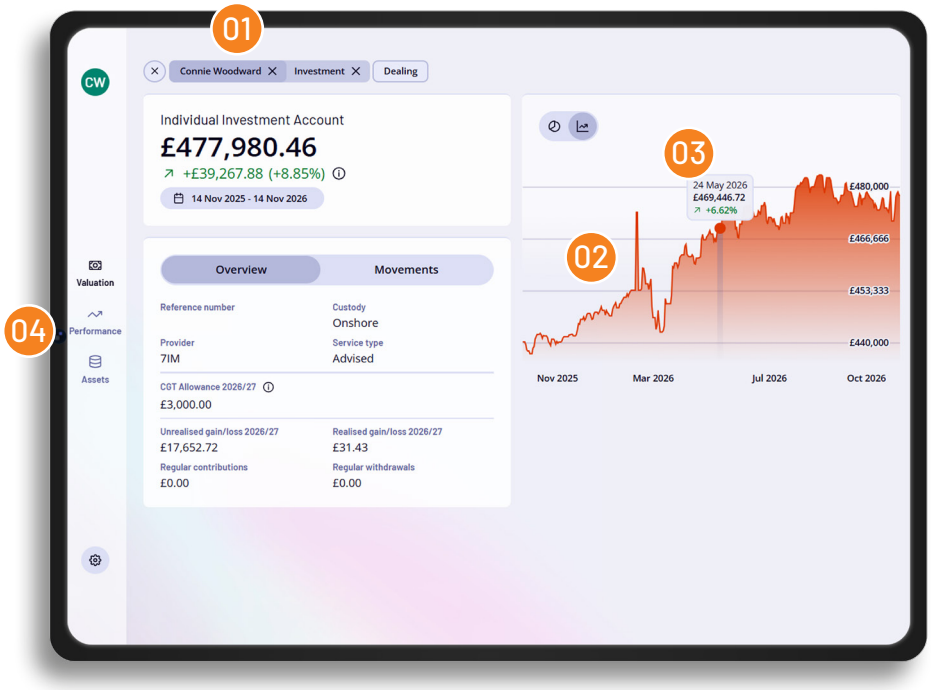
Open the fund's factsheet and its Product Summary Document (PSD) or Key Investor Information Document (KIID). Funds are moving from KIIDs to PSDs under the FCA's new rules.

Two kinds of gain or loss

A holding's gain or loss is its value today minus what was paid for it (total cost). The portfolio's investment gain or loss only covers the dates you've chosen, and allows for money paid in or withdrawn.

Valuation history

In Valuation, select the chart icon to see how your value has changed over time.



01

Available at all levels

See the history for your group, yourself, Joint Wealth, an account or a portfolio, for the dates you've chosen.

02

Money in and out

Rises and dips include money you've added or withdrawn, not just how your investments performed.

03

Hover for detail (or tap on mobile)

Hover over the chart (or tap on mobile) to see your value on that day. The percentage shows how much your value has gone up or down from the start of the period you've chosen up to that day.

04

Valuation vs Performance

To see how the investments themselves have performed, go to 'Performance'.

Investment gain or loss vs performance

Two measures that answer different questions.

Valuation:



Investment gain or loss

This shows how much your investments have made or lost over the period, in pounds and as a percentage.

Money and assets you've added or withdrawn are taken into account, so these movements aren't treated as investment gains or losses.

The percentage compares your gain or loss with the amount you had invested over the period. If you've withdrawn more than you had invested, we calculate the percentage using the amount invested before withdrawals.

Performance:



Time-weighted return

This shows how your investments have performed over the period.

It calculates your investment return each day and links these daily returns together. This reduces the impact of when money or assets were added or withdrawn and makes it more suitable for comparing investment performance with a benchmark.

Performance is shown gross of fees.

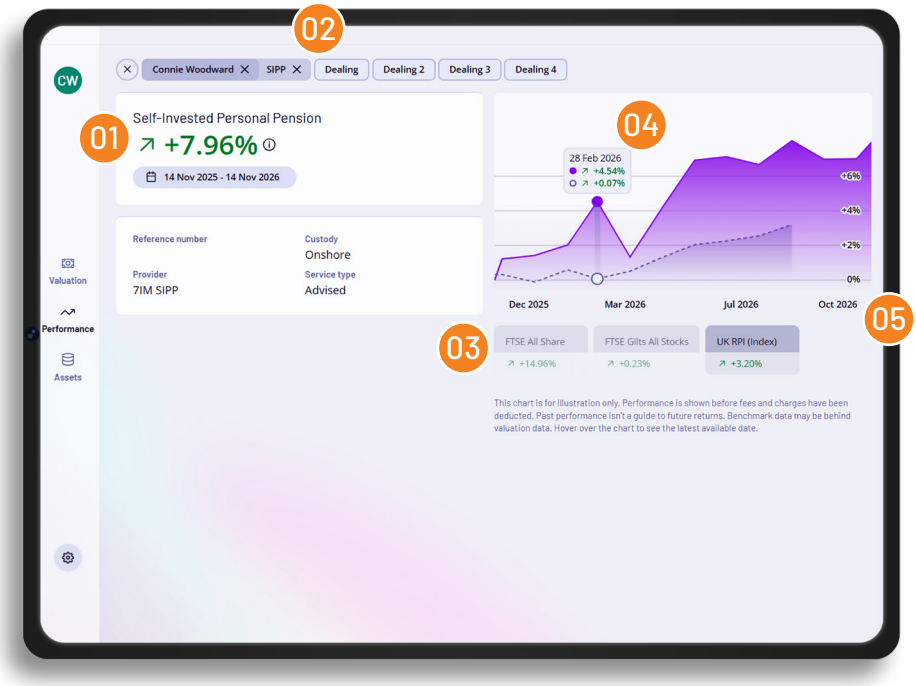


They measure performance in different ways

Investment gain or loss compares the amount you've made or lost with the amount invested. Time-weighted return calculates performance over time, so the timing of money being added or withdrawn has less impact. This means the two percentages can be different, particularly if you've added or withdrawn money during the period.

Performance and benchmarks

See how your investments have performed and compare them with a benchmark.



01

Time-weighted return

Shows how your investments themselves have performed, without the effect of money paid in or taken out.

02

Available at all levels

See performance for your group, yourself, Joint Wealth, an account or a portfolio, for the dates you've chosen.

03

Compare with benchmarks

See your performance alongside benchmarks. Your adviser chooses which benchmarks you see, and they match your quarterly valuation report.

04

Hover for detail (or tap on mobile)

See performance at a point in time. Select the 'i' icon for an explanation.

05

Benchmark dates

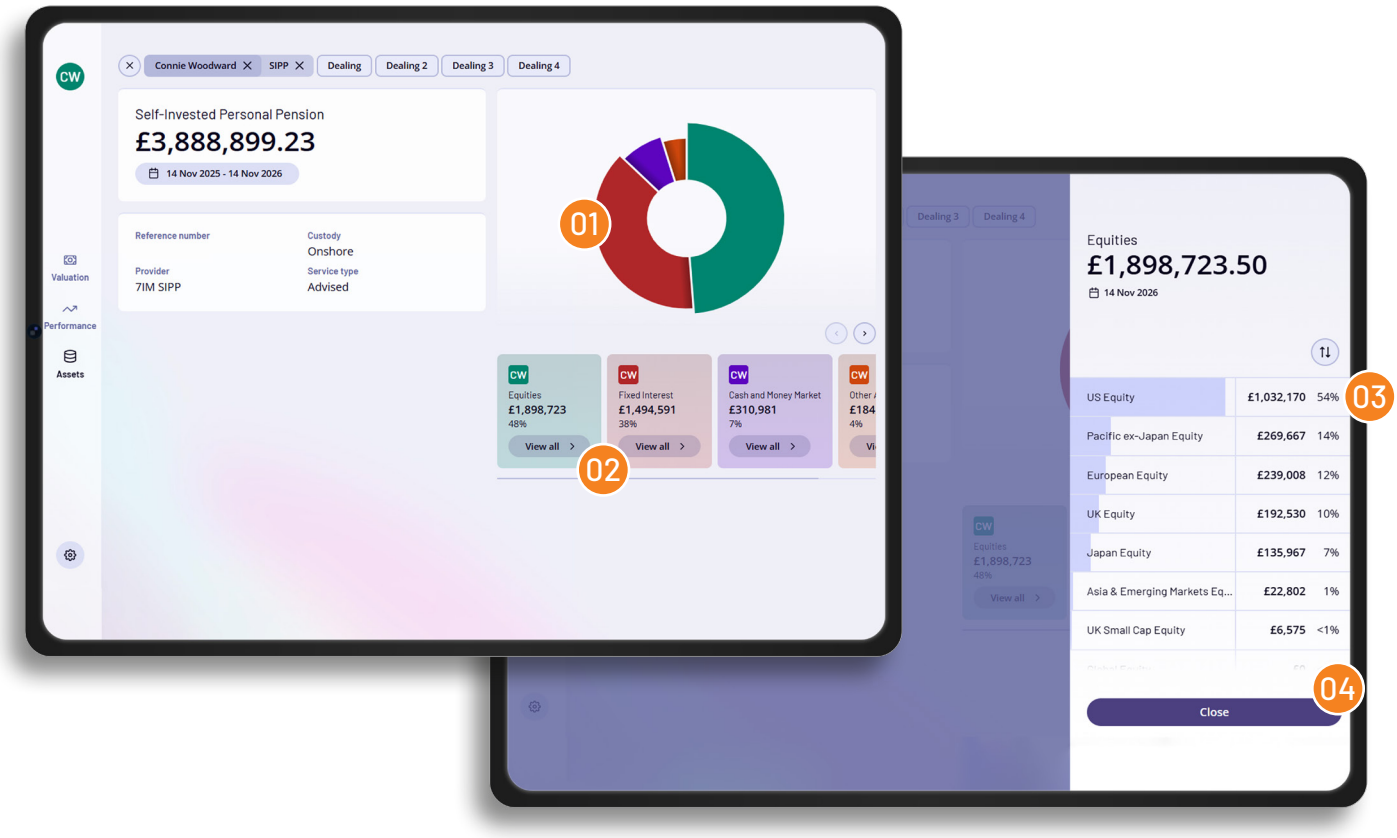
We update benchmark data daily, but some benchmark providers only publish monthly. So the benchmark line may stop slightly before yours.

How it's calculated

We work out how your investments performed each day, then link these daily returns together. This means money you add or withdraw doesn't change the result. Performance is shown before fees and charges.

Assets

See how your money is invested across different types of asset.



01 **How your money is invested**
See your split across broad asset classes.

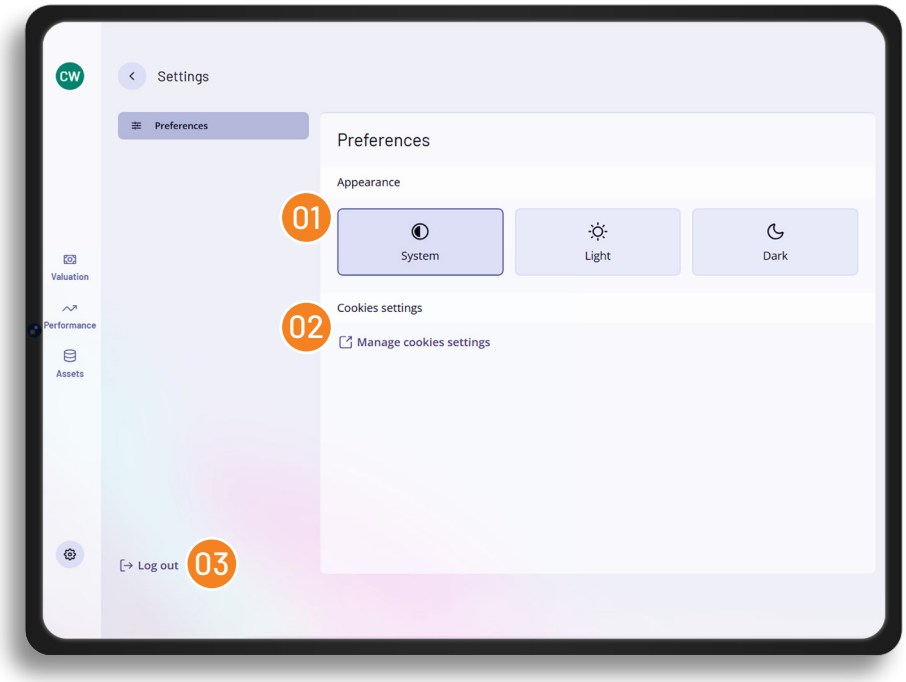
02 **See the underlying asset classes**
Select 'View all' to see more detail.

03 **Percentages**
The detail shows each part as a share of its asset class.

04 **Small amounts**
Figures are truncated, not rounded, so they may not add up to exactly 100%. Very small amounts show as <1%.

Settings

Select the settings icon at the bottom of the menu.



01

Appearance

Choose ‘System’ to match your device’s setting or always use Light or Dark mode.

02

Cookies

Select ‘Manage cookies settings’ to choose which cookies you allow. Your appearance choice is saved using cookies.

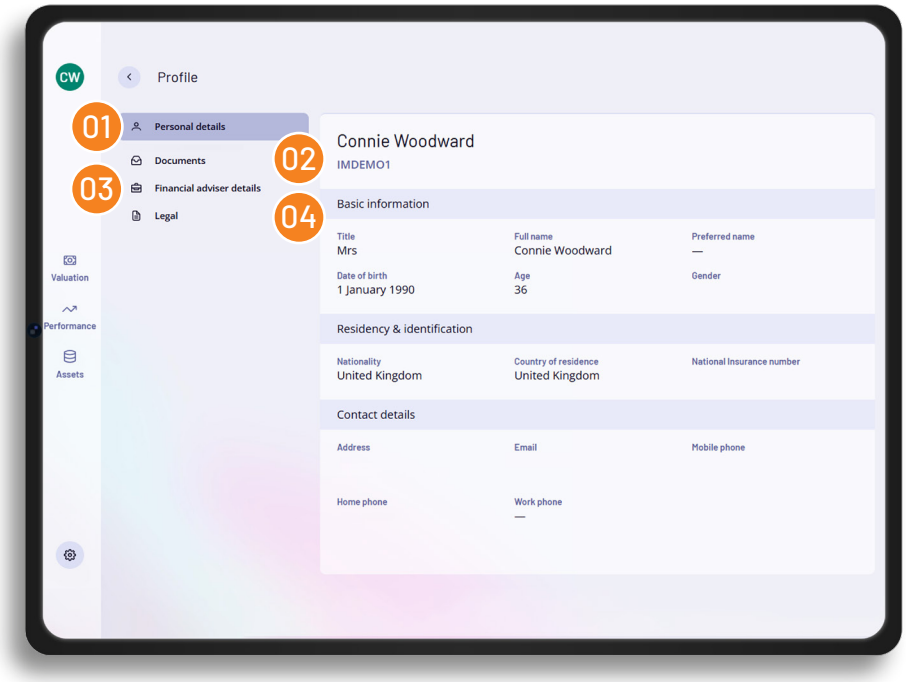
03

Log out

Select ‘Log out’ at the bottom of the screen when you’ve finished.

Profile

Select your initials at the top of the menu to see your details.



01 **Personal details**
See your personal details.

02 **Documents**
Find your documents here including your quarterly valuation reports and contract notes.

03 **Financial adviser details**
Contact details for your adviser. Depending on your service, you may see Investment Director details or Self Invest support instead.

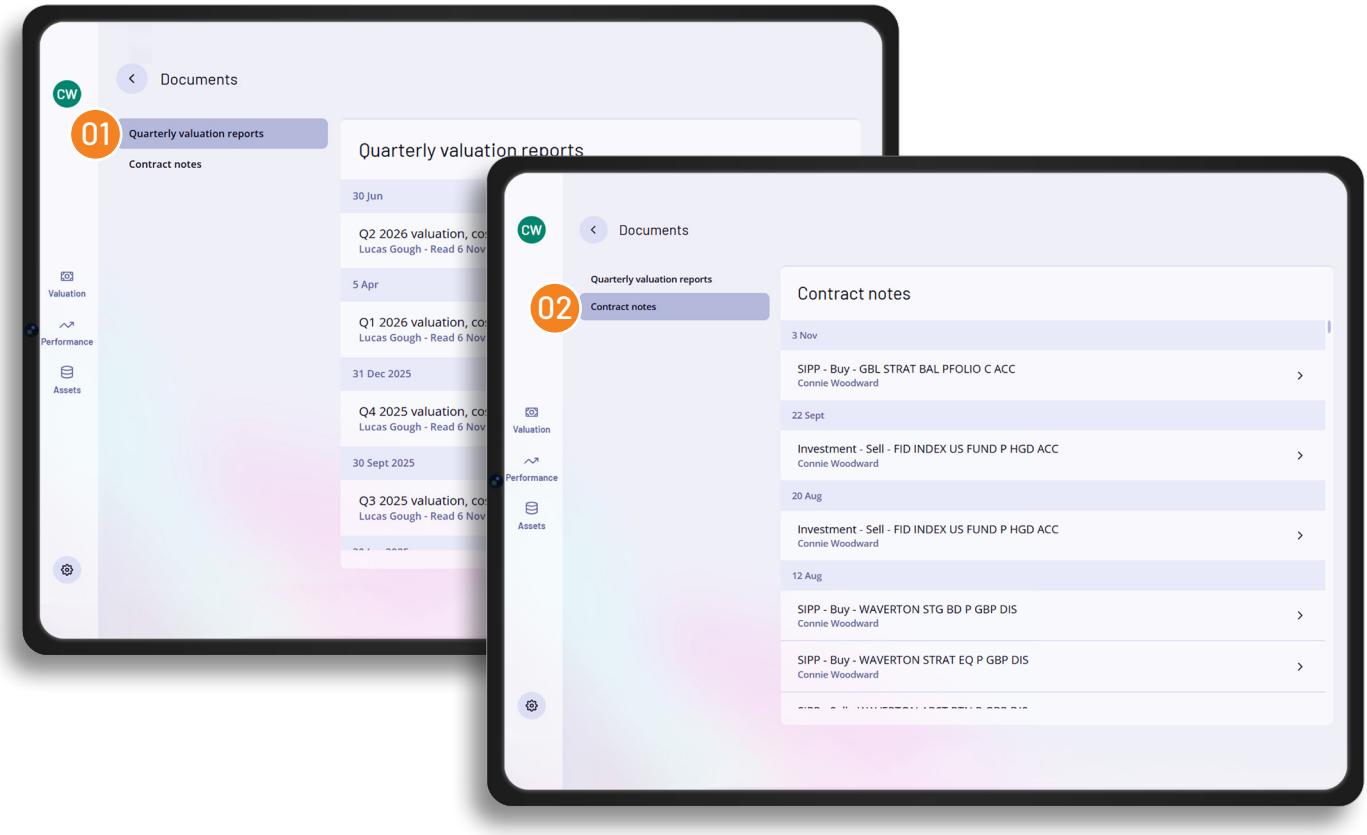
04 **Legal**
Terms and other legal information.

Something needs updating?

If any of your details have changed, speak to your adviser, or your 7IM Investment Director if you have one.

Documents

See your documents in one place.



01

Quarterly valuation reports

You can download your quarterly valuation reports for all your reporting groups.

02

Contract notes

See all your trade confirmations online including which account they're from and view additional information for each trade.

Frequently asked questions

Using the app and portal.



When will we be able to see transactions and reports?

Through the course of 2027 we will continue to add features to the app and portal. This will include Capital Gains Tax reporting, positions, transaction reports, as well as on-screen transactions.



Why is a holding's gain or loss different from the portfolio's?

A holding's gain or loss is its value today minus what was paid for it (total cost). At portfolio level, investment gain or loss only covers the dates you've chosen and allows for money paid in or withdrawn.



My values are shown in US dollars. Are my investments held in dollars?

Not necessarily. Your reporting currency only sets how values are shown, not the currency of what you hold.



I'm a Client Member. What will I see?

A list of the clients you're linked to. Choose one to view; you can view one client at a time, including any accounts they share with other clients which will appear as Joint Wealth.



What's the difference between investment gain or loss and performance?

Investment gain or loss shows what your investments have made or lost, after allowing for money added or withdrawn. Performance shows how the investments themselves have done. Both are correct – see Investment gain or loss vs performance.



Why does my investment gain or loss percentage look low?

The percentage compares your gain with the money you had invested: your starting value, plus money paid in, less money taken out. Large payments in and out can change how it looks.



Can I download my contract notes as a PDF?

For now, contract notes will be displayed on screen. If you require a PDF version, you can contact us or speak to your adviser.

Why is the price of my investment different from the price I can see elsewhere?

Your investments are valued using closing prices from our last daily update, which is usually the end of the previous working day. Prices you see elsewhere, such as on a financial website, may be live and change throughout the day.

Still need help?

For questions about your investments, speak to your adviser. For help logging in, call Client Support on the contact details below.

020 7760 8707 **8:30am to 5pm**

Seven Investment Management LLP is authorised and regulated by the Financial Conduct Authority.
Member of the London Stock Exchange. Registered office: 1 Angel Court, London EC2R 7HJ.
Registered in England and Wales number OC378740.

11.26