7IM Platform

An investor's guide



Succeeding together

7IM

Capital at risk

You should be aware that the value of investments may go up and down and you may receive back less than you invested originally.

7IM considers that the obligation to provide appropriate advice and explain the risks inherent in the portfolios falls to advisers.

7IM PLATFORM SERVICE

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About 7IM

We're 7IM. As an investment management business, we help individuals and their families manage their capital to meet their financial needs and aspirations.

We look after over £19 billion of our clients' money. Our team of nearly 600 people is focused on delivering the best outcomes for all of our partners and clients.

We started our business in 2002 with the aim of doing things differently. In 2005 we launched our investment platform so that clients and financial advisers can transact the widest range of investment solutions. Whether your financial adviser looks after your portfolio or uses one of our solutions, we pride ourselves on delivering exceptional customer service and the best outcomes.

2002

Founded in 2002

600

A team of almost 600 people

£19 billion

Over £19 billion of assets under management

Built for you

Your portfolio in one place

An investment platform is an online service that provides you with a centralised view of your investment portfolio. It shares similarities with online banking, but is built to handle all of your investments.

Platforms had their beginnings in fund 'supermarkets', which were first introduced in the UK in 1999. They were fairly straightforward back then, allowing investors to carry out simple transactions and view valuations within general investment portfolios.

Since then, the technology has improved and platforms have become much more sophisticated. Today they provide your financial adviser with a complete toolset for administering your portfolio.

Benefits for you:



Simplicity

View your entire portfolio in one central location, complete with high-quality reporting, different currencies if you need it and user-friendly technology.



Flexibility

Designed to suit your needs as they evolve, whether it is a straightforward portfolio or something more complex like discretionary investment management.



Security

You can rest easy knowing that your data is protected by strong security standards, while your assets are held under safe custody.



Accessibility

Our platform's client portal is easy to use and accessible wherever you may be. Log on anytime, anywhere through our 7IM app and portal.

What investment platforms do for you

Making investing easier

With an investment platform, your adviser has access to multiple investment options through an online portal. These include direct investment in company shares, bonds, funds, investment trusts, cash and more.

The benefit of a platform is that it allows you to hold all your investments in a single account, rather than investing directly with individual fund managers, brokers and pension providers. This makes it easier for your financial adviser to administer your portfolio and buy or sell holdings as required.

The 7IM Platform provides access to a wide range of investment products and intelligent tools to suit your various financial planning needs, whether you want to invest in an ISA or a pension, or into company shares or bonds.

At a glance

- Hold all your investments in one central location
- Simple, straightforward way for your adviser to buy and sell investments
- Access the widest possible range of investments
- View your portfolios in real time via the 7IM app and portal

How the 7IM Platform can help you

Meeting your complex needs

We designed our platform to be both powerful and easy to use. Whether your financial adviser manages your portfolio on your behalf, or chooses to have 7IM make the investment decisions, it offers a solution for every step of your investment journey.

Your financial adviser can use the platform to access the widest range of investment solutions as well as a long list of discretionary fund managers and product wrappers. No matter the investment solution you require, our platform makes it possible.

All of your investments will be visible on one user-friendly online service which can be accessed through multiple devices via our 7IM app and portal.

Rather than receive statements for each individual investment in your portfolio, you will receive a comprehensive report of all your holdings every quarter.

It is important to remember that our platform may not be suitable for everyone and is only available to clients who have a financial adviser. Your adviser will be able to use the platform to closely monitor your portfolio and ensure it is tax efficient.

Comprehensive services for you

Providing you with flexibility and security

The 7IM Platform is more than a simple platform – it's a service for your financial future. Our dedicated team of client service professionals are on hand to help you and your financial adviser every step of the way.

We understand that financial markets move quickly and your circumstances are constantly evolving. That's why we provide a comprehensive set of tools and resources to help your adviser ensure that your financial plan is implemented in a way that works best for you.

Our philosophy is to provide our clients with maximum flexibility. We provide you with access to a variety of tax and pension wrappers, such as ISAs, SIPPs, general investment accounts, trusts, multi-currency solutions and charity and corporate accounts. You will also benefit from access to a broad range of fund structures and products, as well as securities listed on UK and international stock exchanges, such as company shares, government and corporate bonds, and other specialist financial tools.

We pride ourselves in providing you with an exceptional experience that has transparent costs and a strong focus on data security. Our fees and charges are clear up front and we take no payments from fund providers. We also make sure the platform is kept up-to-date with all the changes in regulation.



Why it adds up

Your investment portfolio is important to you – that's why we built a platform that is flexible and individual. Not only does it allow your financial adviser to manage your investments, its wide range of investment options and financial planning tools ensure it will suit your circumstances as they evolve.

We believe we are defined by providing you with what matters most: exceptional service and innovative products that are constantly improving.

If you would like further information regarding any of our services:

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Seven Investment Management LLP is authorised and regulated by the Financial Conduct Authority.
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Registered in England and Wales number OC378740.

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