TARGET MARKET INFORMATION
7IM INVESTMENT ACCOUNT, ISA AND JISA

FINANCIAL ADVISERS ONLY // JUNE 2023

7IM Investment Account

The 7IM Investment Account is suitable for clients who:

- Are a UK resident
- Are an individual aged 18 and over or a company, charity, trust or pension scheme
- Have fully utilised their annual ISA allowance
- Wish to invest over the medium-to-long term with the aim of achieving growth or income, bearing in mind that this is not guaranteed
- Understand their investments will be subject to relevant taxes
- Happy to accept more risk than saving in a bank or building society account

The 7IM Investment Account is not suitable for those who:

- Are US or EEA residents
- Have no other savings
- Have a short-term view to investments (five years or less)
- Are not happy to accept the risk of potential investment losses
- Require a guaranteed return on their investments

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

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7IM Individual Savings Account (ISA)

The 7IM ISA is suitable for clients who:

- Are a UK resident
- Are aged 18 and over
- Have unused ISA allowance for the current tax year
- Wish to invest in a tax-efficient way over the medium to long term with the aim of achieving growth, bearing in mind that this is not guaranteed
- Have not opened another stocks and shares ISA within the current tax year
- Happy to accept more risk than saving in a bank or building society account

The 7IM ISA is not suitable for those who:

- Are US or EEA residents
- Have no other savings
- Have a short-term view to investments (five years or less)
- Are not happy to accept the risk of potential investment losses
- Require a guaranteed return on their investments
- Have fully utilised their annual ISA allowance

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7IM Junior ISA (JISA)

The 7IM JISA is suitable for clients who:

- Are a UK resident under the age of 18
- Do not hold a Child Trust Fund (CTF)
- Have unused JISA allowance for the current tax year

The registered contact opening the account on the child's behalf must:

- Be a UK resident aged 18 or over
- Be a parent, guardian of the child or persons with parental responsibility
- Be an existing 7IM account holder
- Wish to invest in a tax-efficient way over the medium to long term with the aim of achieving growth, bearing in mind that this is not guaranteed
- Are happy to accept more risk to their capital than saving in a cash JISA through a bank or building society
- Have not opened another stocks and shares JISA for the child within the current tax year

The 7IM JISA is not suitable where the registered contact opening the account:

- Are US or EEA residents
- Have no other savings
- Have a short-term view to investments (five years or less)
- Are not happy to accept the risk of potential investment losses
- Require a guaranteed return on their investments

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