7IM

FAQ

Target Market Information 7IM Discretionary Service

FINANCIAL ADVISERS ONLY

Who can assess the 7IM Discretionary Service?

The 7IM Discretionary Service is available to individuals, corporate and partnerships, charities and trusts who have a financial adviser.

The 7IM Discretionary Service is suitable for clients who:



Are a UK resident



Have an FCA Regulated financial adviser



Are willing to open a 7IM account or have a third-party SIPP or Bond



Have over £200,000 to invest*



May wish to access a range of tax wrappers



Want to save for either capital growth or income



Looking to invest in a discretionary strategy that uses 7IM investment solutions



Wish to seek advice and defer ongoing management of their portfolio to a dedicated team



Wish to have a relationship with 7IM and the option of face to face reviews of their portfolio



Wish to invest for the medium-to-long term (five years +)**



Wish to consolidate and see all of their investments in one place

*The minimum investment amount is dependent on the client's individual circumstances and can be waived at 7IM's discretion.

** Excluding Gilt Portfolios

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

FAQ

For those accessing the Retirement Income Service: clients who are seeking greater control over their income in retirement while mitigating many of the pitfalls associated with income drawdown

Please refer to **7IM Investment Account, ISA and JISA target market** or the **7IM SIPP target market** for wrapper specific requirements.

The 7IM Discretionary Service is not suitable for those who:



Do not wish to use a financial adviser



Are US or EEA resident



Cannot bear loss of capital



Have a short-term view to investments (less than five years)



Have very small portfolios



Are looking for a self-serve or execution only type service with no advice



Looking to invest in a discretionary strategy that uses non-7IM investment solutions



Are looking to transfer investments from elsewhere with guarantees or protections that cannot be maintained (e.g. life products)

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