

FINANCIAL ADVISERS ONLY // JUNE 2023

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

The 7IM Platform 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 £1,000 to invest



Require a broad range of investment options



Wish to access a range of tax wrappers



Want to save for either capital growth or income



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



Wish to make regular or ad-hoc withdrawals from their investments



Wish to invest for the medium-to-long term

For those accessing the Retirement Income Solution: 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 Platform Service is not suitable for those who:



Do not wish to use a financial adviser



Are US or EEA resident



Wish to invest in insured funds only



Have a short-term view to investments



Have very small portfolios



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



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

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

www.7im.co.uk

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