

FINANCIAL ADVISERS ONLY // JUNE 2023

The 7IM SIPP is suitable for clients who:

Are a UK resident



May wish to use 7IM for all their investment wrapper needs (i.e. ISA, SIPP and Investment Accounts)



Are in accumulation or decumulation phases



Wish to consolidate their pension pots



Wish to build up a pension pot in a tax efficient way



Require control and flexibility over how they take their benefits



Are looking for access to a guaranteed income option at retirement



Are a new client in accumulation stage with pension pot(s) in excess of £30,000*



Are a new client in decumulation stage with pension pot(s) in excess of £200,000*

*These amounts are subject to 7IM's discretion.

The 7IM SIPP is not suitable for those who:

Are US or EEA residents



Wish to transfer in their Defined Benefit Pension pot



Wish to invest in more specialist type investments, such as property

Financial advisers can access the 7IM SIPP through the 7IM Platform Service or 7IM Discretionary Service.

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

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.

7IM Investment and Retirement Solutions Limited is authorised and regulated by the Financial Conduct Authority. Registered address 1 Angel Court, London EC2R 7HJ. Registered in England and Wales number 10902511.