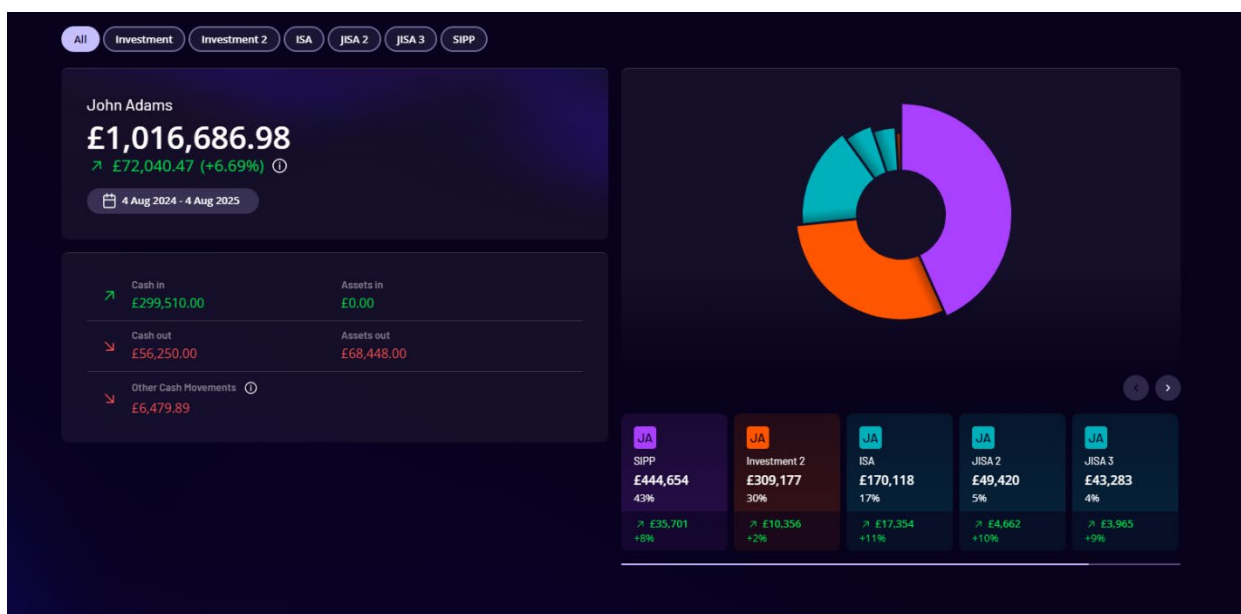


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7iM UNVEILS POWERFUL NEW DIGITAL REPORTING FEATURE FOR ADVISERS



7iM has launched the first phase of its next-generation reporting suite, designed to give advice firms using its platform faster, smarter access to client data. Built with intuitive functionality and adviser feedback at its core, this upgrade is part of 7iM's multi-year, multi-million-pound investment in its award-winning proprietary platform – a cornerstone of its strategic growth plans.

The new Online Reporting feature – reimagines how client valuations including investment gain at client, account and portfolio levels are shown - consolidating key data into one sleek, easy-to-use interface. This simplifies the reporting process and streamlines the number of systems required.

In late 2025/early 2026, 7iM has further enhancements planned – with family group reporting, time-weighted performance and asset allocation all on the roadmap.

Looking further ahead, 7iM plans to replace its client portal and 7iMagine app with the same experience – eliminating multiple logins and delivering a single, unified view for advisers and clients.

It's modern, digital-first, and inspired by the best in tech – think Spotify, Monzo, Revolut. Moreover, it has been shaped by adviser feedback from day one. 7iM has also enabled advisers to leave feedback directly within the platform, which will help guide future enhancements.

PRESS RELEASE



This launch follows 7IM's revamp of its transfer process and move to a cloud-based system - boosting scalability, resilience, and data-driven decision-making.

Kieran Cardozo-Smith, Head of Product Design at 7IM, commented: *"Our goal was to craft an experience that feels effortless — clean, intuitive, and centred around the needs of advisers and their clients. Drawing inspiration from a wide range of sources, we've tackled key user challenges with a focus on making client reporting data more accessible, engaging, and visually compelling. We're excited to see advisers embrace Online Reporting and look forward to evolving it further over the next 12–18 months, helping reduce the time and effort required to prepare for client reviews."*

Russell Lancaster, Managing Director of Platform and Intermediary Partnerships at 7IM, added: *"Advisers told us they needed fast, reliable access to client data – all in one place. This launch delivers exactly that. It's a major step forward in helping firms save time, strengthen client conversations, and stay ahead in a fast-moving market."*

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Notes to Editors:

About 7IM

At 7IM, we want to deliver an unrivalled experience for all of our clients – whether that's individuals, families, or businesses.

For financial advisers and planners, this involves us standing alongside them to support them with whatever they need, so they can focus more on what really matters: nurturing their relationships with clients to deliver on their financial plans. Our offering for advisers reflects that: an open architecture platform, multi asset investment solutions to fit whatever their investment philosophy is and help with discretionary investment management.

For our private wealth clients, it all starts with understanding the client, their families, and their goals and then creating a bespoke financial plan designed to help them achieve financial freedom.

We use cutting-edge technology to help make things simple and clear, but what really sets us apart is our real, honest, human service. No automated helplines or chatbots. You'll always talk to a person.

Today, from our offices in London and Edinburgh, our team of approximately 600 talented people are entrusted to manage over £24 billion (as at January 2024) for a range of clients, including individuals and families, financial advisers, corporates, charities, and trustees.

In January 2024, Ontario Teachers' Pension Plan, a global investor with net assets of \$255.8. billion (as at June 30 2024), acquired a majority stake in 7IM.

PRESS RELEASE



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