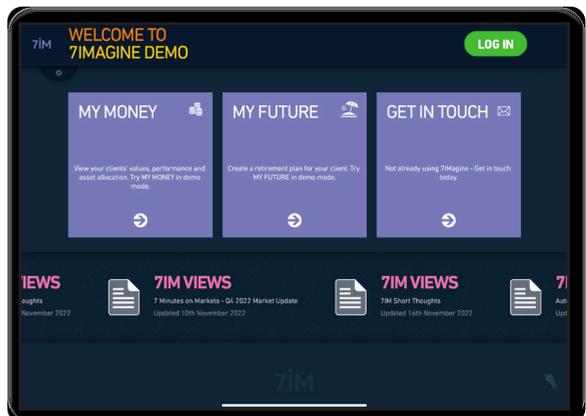


DISCOVER 7IMAGINE

7IM

ABOUT

Client portfolio management might not be entertaining, but it should be engaging. We have utilised gaming technology to bring your client's portfolio to life. 7IMagine is interactive, easy to use... and free!



FEATURES



Client Rolodex

An online rolodex which works just like an old style one, but with the benefits of numerous filters and search capabilities to enable you to locate the client you wish to view.



My Money

Allows you to view your client's overall investments or drill down into each investment account to see the underlying holdings. This feature provides a complete view of the client's holdings including asset valuations, performance and the geography of the investments. 7IM fund factsheets are provided, while Morningstar supplies factsheets for third party holdings.



7IMagine Demo

Allows you to interact with a demo client and understand the information displayed within My Money.



GETTING STARTED

It's easy to start using 7IMagine. Your login details to the 7IM Platform also provide access to 7IMagine, just as they do for your clients. The My Future feature is not provided automatically.

To start using My Future, or if you have any questions, all you need to do is contact your 7IM Business Development Manager on 020 3823 8829.

Download 7IMagine from the Apple, Google Play or Microsoft Store.



If you would like further information regarding any of our services, please contact us on

7imagine@7im.co.uk

020 3823 8829

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