

PRESS RELEASE



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7IM BOLSTERS INVESTMENT LEADERSHIP WITH APPOINTMENT OF CO-CHIEF INVESTMENT OFFICERS

7IM today announces it has appointed Matthew Yeates and Shanti Kelemen as Co-Chief Investment Officers, both reporting directly to CEO Dean Proctor.

As Co-Chief Investment Officers, they will jointly oversee 7IM's Investment Management team—each bringing distinct but complementary expertise. Together, they will lead the firm's investment strategy, client communication and propositional development, as 7IM continues to scale and integrate recent acquisitions.

Yeates, formerly Deputy CIO at 7IM, brings deep expertise in quantitative strategies, risk management and alternatives, having held senior positions within the firm focused on these respective areas. He was also the lead architect behind 7IM's award winning retirement income solution.

Kelemen, who starts on 1 September, joins from M&G Wealth Investments, where she served as Chief Investment Officer, bringing with her a strong background in investment strategy, business development and client engagement. Prior to M&G Wealth Investments, Kelemen has held senior positions at Brown Shipley & Co and Coutts.

The announcement follows a series of recent senior leadership appointments—including Nick Allen as Chief Integration Officer, Harriet Massey as Chief Transformation Officer, and Chris Phillips as Chief Value Officer—as 7IM continues to invest in the strength, depth and breadth of its executive leadership to support the firm's long-term growth ambitions.

Commenting on the appointments, Dean Proctor, CEO of 7IM, said: "I'm delighted to appoint Shanti and Matthew as Co-CIOs. Together, they bring complementary strengths, deep insight, and a shared passion for delivering exceptional investment outcomes for our clients. These appointments are a clear signal of our ambition to scale with purpose—anchored by robust governance, strategic clarity and a team of outstanding leaders."

Matthew Yeates, Co-Chief Investment Officer at 7IM, said: "It's a privilege to step into this role and lead the next chapter of our investment approach alongside Shanti. We've built strong foundations and real momentum—but there's more to do, and we're just getting started. It's great to have Shanti join and, with her different experience and perspectives, I'm excited to work together on delivering our growth ambitions."

Shanti Kelemen, Co-Chief Investment Officer at 7IM, added: "I'm thrilled to be joining 7IM at such an exciting time in its growth journey. Working with such a high-calibre team to help advisers and clients is a fantastic opportunity. I look forward to co-leading 7IM's talented investment team with Matthew."

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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.

Important information: The information contained in this document does not constitute investment advice and if you are in any doubt about the suitability of the investment or service, you should consult a professional financial adviser. The value of investments, and the income from them, can fall as well as rise and you may not get back the full amount invested. Seven Investment Management LLP is authorised and regulated by the Financial Conduct Authority. Registered office: 1 Angel Court, London EC2R 7HJ. Registered in England and Wales No. OC378740