

A guide to the 7IM Client Portal

How to register and view your investments

Succeeding together



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Accessing your online service

Register to view your own investments

1

7iM

Login

Username

Password

Forgotten password? | Reset access

Login

New to viewing your account online? Register

Cookie Policy

On the '**Login**' screen, click on the '**Register**' link.

2

7iM

Registration

Information on how to register.

Select an option to continue

I would like to view my own investments

I would like to view investments held on behalf of a:

- Client (if you have Power of Attorney / Court of Protection)
- Corporate entity
- Charity
- Trust

Continue

Cookie Policy

On the '**Registration**' screen select the option '**I would like to view my own investments**'. If you are linked to other family members you will also be able to see their investments.

3

7iM

Registration

Last name

Date of birth

National Insurance number

I do not have a National Insurance number

I have read and agree with the 7iM Online service terms

We will process your personal data in accordance with our Privacy Policy

Submit

Cookie Policy

At this point, you will need to input the following personal information:

- Your last name
- Your date of birth
- Your National Insurance number or bank details
- Your email address
- Your mobile phone number

Read and tick to confirm the 7iM Online Service terms, then '**Submit**'.

You will now be prompted to set up two-factor authentication. Two-factor authentication is an additional security step, which means a code will be sent to either your email or phone that you need to input each time you login.

Accessing your online service

Continued

Before you can register for online access, please ensure you have the reference that was on your **'Welcome Letter'** as you will need to enter that on screen.

Register to view investments on behalf of a Trustee or Power of Attorney

1

7iM

Login

Username

Password

Forgotten password? | Reset access

Login

New to viewing your account online? Register

Cookie Policy

On the 'Login' screen, click the **'Register'** link.

2

7iM

Registration

Information on how to register.

Select an option to continue

I would like to view my own investments

I would like to view investments held on behalf of a:

- Client (if you have Power of Attorney / Court of Protection)
- Corporate entity
- Charity
- Trust

Continue

Cookie Policy

On the **'Registration'** screen, select **'I would like to view the investments on behalf of a:'**

- **Client (if you have Power of Attorney/Court of Protection)**
- **Corporate entity**
- **Charity**
- **Trust'**

3

7iM

Registration

Last name

Reference Number

Email Address

I have read and agree with the 7iM Online service terms

We will process your personal data in accordance with our Privacy Policy

Submit

Cookie Policy

On the following screen, please enter the following personal information:

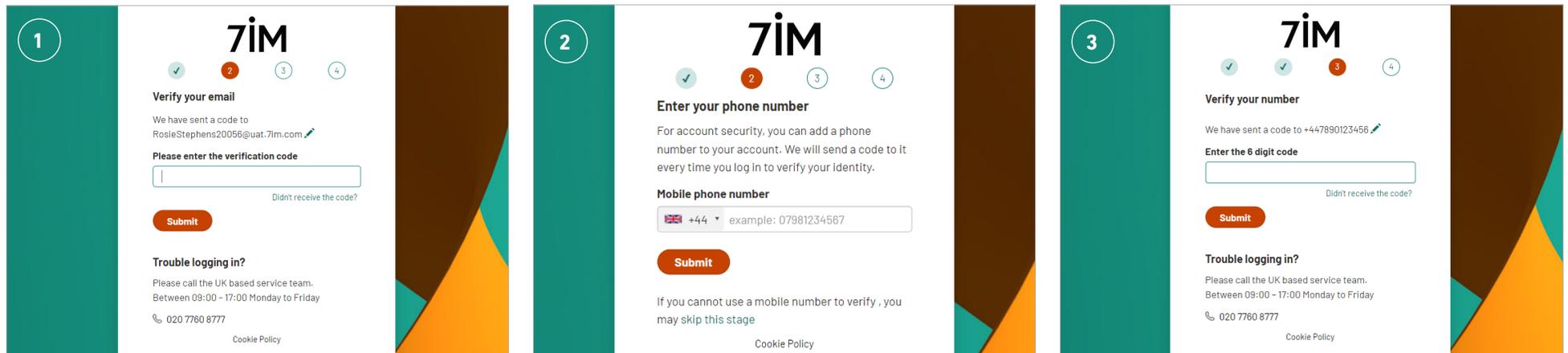
- Your last name
- Your reference
- Your email address
- Your mobile phone number

Read and tick to confirm the 7iM Online Service terms, then Submit.

You will now be prompted to set up two-factor authentication. Two-factor authentication is an additional security step, which means a code will be sent to either your email or phone that you need to input each time you log in.

Setting up two-factor authentication

These steps are to be followed if you are viewing your own investments, or on behalf of a trustee or power of attorney.



On the **'Email verification'** screen, enter the verification code we have sent to your email address. If you do not receive a verification code within a couple of minutes you can request a new code by using the **'Didn't receive the code'** link and 7IM will send you a new code.

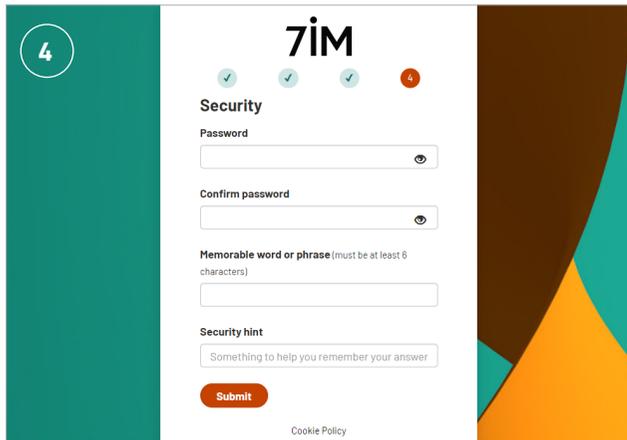
Enter your mobile number for verification.

Having two methods of communication verified is the most secure way to log in. *However, if you do not wish to verify your mobile number, you may skip this step and move to step 4.*

On the second verification screen, enter the verification code we have sent to your mobile phone. If you do not receive a verification code within a couple of minutes you can request a new code by using the **'Didn't receive the code'** link and 7IM will send you a new code.

Setting up two-factor authentication

Continued



4

7IM

Security

Password

Confirm password

Memorable word or phrase (must be at least 6 characters)

Security hint

Something to help you remember your answer

Submit

Cookie Policy

On the security details screen you will need to create a password, a memorable word and hint. Your password must contain a minimum of 10 characters and at least 3 of the following:

- a number
- a lowercase letter
- a uppercase letter
- a special character

You have now created your login details.

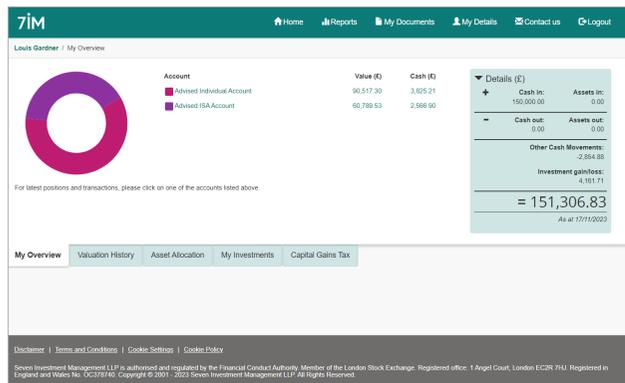
Next time you log in your login details will be:

- **Username:** this will be your email address.
- **Password:** this will now be the password you have created in step 4 that is a minimum of 10 characters. You will need to enter all of the characters when logging in.
- **Security code:** a security code will be sent directly to your email address or mobile phone.



Using the 7IM Client Portal

My Overview

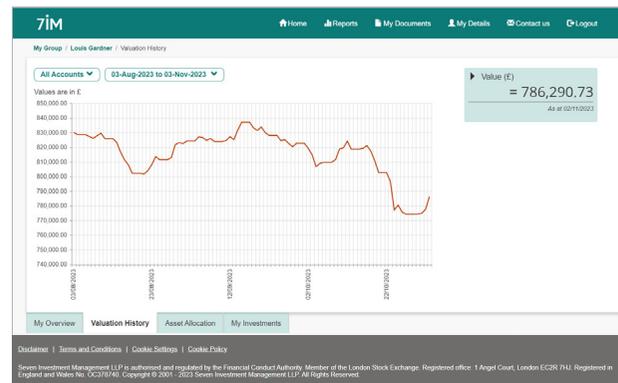


My Overview shows you a high-level view of your investments. If your account is part of a family or trust group, you will also be able to see the total investment values for all members.

You can click on the name of your account in the summary table or select individual accounts using the drop down to view individual accounts in more detail.

In the box titled '**Value**', click on the arrow to view a quick summary of your investments.

Valuation History

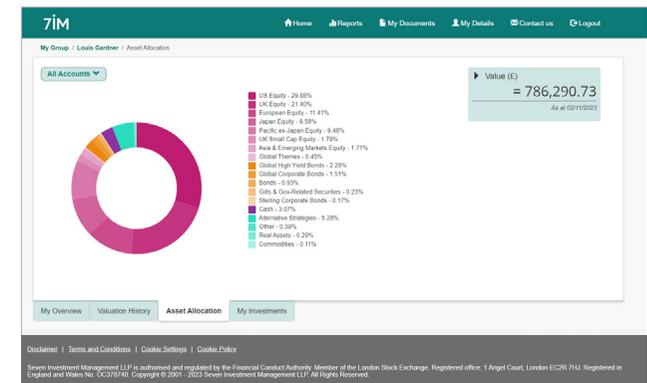


Valuation History shows you the value of your account over time. The default setting display shows the value of all of your accounts over the previous three months.

You can use the filters in the top left of the screen to select individual accounts or change the time period. Clicking on the date range opens a window pre-populated with a few default date ranges. You can also enter specific dates of your choice.

The Investments at a glance summary is also available here.

Asset Allocation

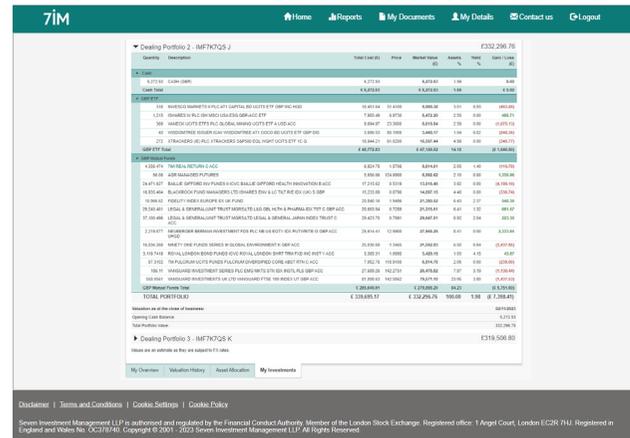


You can view how your assets are allocated across all of your accounts.

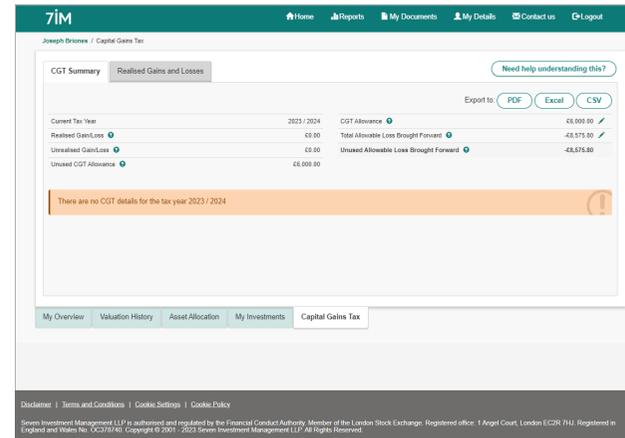
If you would like to view this at an individual account level, use the drop down on the left.

Using the 7iM Client Portal Continued

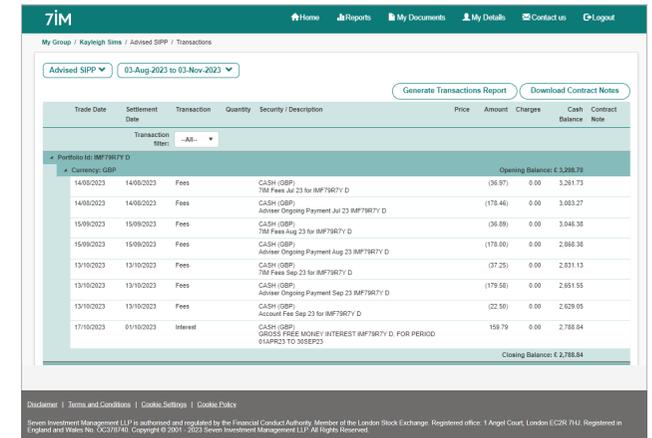
My Investments



Capital Gains Tax (CGT)



Transactions



View a list of all of your investment holdings via My Investments. Use the arrows on the left to expand and collapse individual portfolios.

For each holding you can see the cost of the holding, the current price and value, the asset % split (vs rest of account) the yield % and the gain and loss £ value.

If you have a financial adviser they will take responsibility for managing your Capital Gains Tax (CGT) position.

The CGT summary displays your current CGT eligible holdings and unrealised gains and losses.

Click on the '**Need help understanding this**' for a detailed guide to our CGT tool.

Selecting an Individual account on any of the screens will display the '**Transactions**' tab.

You can use the filters at the top of the page to switch between accounts and time periods. The Transaction filter can be used to further search for specific types of transactions. Contract notes are displayed next to all purchase and sale transactions.

Use the '**Download Contract Notes**' button to generate a single .pdf file of all of your available contract notes which you can print or save locally. The '**Generate a Transactions Report**' button creates a .pdf version of all of your transactions displayed on screen. Again you can print or save these locally.

Using the 7IM Client Portal

Continued

Reports

In the top menu there is a section called **'Reports'**. Here you can generate reports that show your Transactions (that have happened in a specified period), Positions (Your holdings at a specific date) or your Capital Gains Tax Unrealised or Realised Gains for a chosen tax year.

All reports can be generated in either Excel, CSV or .pdf format.

My Documents

'My Documents' is where you will find current and historic Portfolio Valuation Reports. You can use the date filters to help you find the report you are looking for.

My Details

'My Details' contains all of your client service information. The name, email and phone number of your Financial Adviser or Relationship Manager is displayed here.

Where appropriate we also display your risk profile here. This page contains the contact information we have for you.

You can also change your password or memorable date or phrase here.

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Contact Us

'Contact Us' will show you how to contact 7IM if you need any help with your account. Please note we are not be able to accept requests to reset your password using this form.

Logout

We recommend that once you have finished reviewing your account you use this to log out.

Download the 7IMagine App

The 7IMagine App gives you total control and oversight of your finances in a fast, secure and intuitive way, wherever and whenever you desire.

You are able to see your portfolio activity, asset allocation, performance, relative risk and so much more.

Please use the same username and password as your online service to log in.

Open your camera on your phone and hold in front of the QR code to download today.

