

30 June 2026

7IM appoints Agustin Fernandez to Chief Corporate Development Officer as its growth strategy accelerates

- *Reflects the significant progress 7IM has made in building a dedicated corporate development & strategy capability*
- *Signals the growing importance of inorganic growth alongside organic growth in delivering 7IM's long-term strategy, as the company seeks to be the destination of choice for clients and like-minded advisers*

7IM, one of the UK's leading vertically integrated wealth managers, today announces the appointment of Agustin Fernandez to Chief Corporate Development Officer.

Already a member of 7IM's Executive Committee, Agustin has been a driving force behind the firm's corporate development strategy since joining in 2023. Under his leadership, 7IM has established a dedicated corporate and strategy development function, combining a high-quality team, a disciplined M&A framework and a proven integration approach that has been successfully deployed across multiple transactions.

During this period, 7IM has completed a series of strategic acquisitions including Amicus Wealth, Eastcote Wealth Management, Johnston Carmichael Wealth, Lync Wealth Management, Rockhold Asset Management and CPN Financial Services. These acquisitions have expanded the Group's presence across key UK wealth centres, strengthened its financial planning and asset management capabilities and contributed total assets of over £8 billion. Each business is being integrated, with a consistent focus on delivering strong client outcomes, plus shared purpose amongst colleagues and partners.

Dean Proctor, Chief Executive Officer at 7IM, said:

"This promotion is well-deserved recognition of the exceptional job Agustin has done in a relatively short space of time. He's built a serious corporate development capability at 7IM - a team, a process and a track record that we can be genuinely proud of."

"We're seeing a significant influx of capital into the UK wealth management sector, particularly in the mid-tier, and that's unlikely to change - if anything, the pace will increase. Having someone of Agustin's calibre leading our corporate development efforts means we're well positioned to act on the right opportunities as they arise."

"But I want to be clear: while strategic acquisitions are an important part of our story, organic growth remains absolutely key. We're building this business for the long term, and that means growing from within just as much as it means finding the right partners to bring into the group."

Agustin Fernandez, Chief Corporate Development Officer at 7IM, said:

"We have built a corporate and strategy development function that delivers meaningful, long-term value for 7IM and the businesses we partner with. Our approach is to acquire and partner with high-quality businesses that are looking to accelerate their growth, or entrepreneurs that

want to step back from the responsibilities of ownership, benefiting from the robust support of 7IM and our private wealth capabilities, while preserving what makes them successful and special today - whether it is their experience, their culture, their energy, their colleagues, their independence or their local relationships.”

“What we focus on above all is quality: quality of advice and quality of the businesses we bring into 7IM. We're not pursuing scale for its own sake. Every acquisition must be strategically compelling and, most importantly, deliver better client outcomes.”

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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 financial planners 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, our team is entrusted to manage c.£35 billion (as at 31 May 2026) for a range of clients, including individuals and families, financial planners, corporates, charities, and trustees.

In January 2024, Ontario Teachers' Pension Plan, a global investor with net assets of \$269.6 billion (as at June 30, 2025), acquired a majority stake in 7IM.

PRESS RELEASE



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