

NEWS

timeline

For Immediate Release

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7IM

Timeline Announces Integration with Seven Investment Management

*Integration will deliver a seamless digital retirement
experience for 7IM advisers*

LONDON [June 18, 2020] – [Timelineapp Tech Limited](#) (Timeline), a fintech company that provides financial advisers with next-generation retirement income software, and [Seven Investment Management](#) (7IM), an investment management business, recently announced an integration partnership that will give 7IM advisers the ability to capture data, such as client details and account holdings, and easily integrate it into the Timeline platform.

“We’re excited to be announcing our integration partnership with 7IM,” said Abraham Okusanya, CEO of Timeline. “Decumulation is one of the biggest challenges for firms and Timeline’s next-gen retirement experience software helps tackle this by creating a robust plan for each client. This integration means that data can move seamlessly from 7IM to Timeline, reducing the time associated with manual data import, or re-keying processes.”

The integration will enable 7IM users to create rich and personalised retirement experiences underpinned by Timeline's science and data-driven capabilities. Advisers can utilise all client information and data already within the 7IM platform – completing 90% of the work involved in creating a plan, while also saving advisers time and reducing human error.

Once all of the data has been captured by Timeline, advisers are able to create viable withdrawal strategies by verifying the withdrawal success rate of a client's portfolio over time, helping to produce highly personalised and sustainable retirement plans.

“Ensuring the best possible outcomes for clients in the drawdown phase of investing and having a robust retirement income strategy has been a growing focus for advisers and the wider investment industry for some time now,” said Verona Kenny, Managing Director of Intermediary at 7IM. “That's why we are delighted to partner with another like-minded innovator such as Timeline. By working together, we can deliver an innovative digital solution to our mutual clients in what has become an increasingly challenging decumulation space.”

TIMELINE DIGITAL ACADEMY

Timeline recently launched the Timeline Digital Academy, which delivers a complete training process by having financial advisers complete simple, concise and effective course modules via remote training sessions. Designed to educate them in the next generation of retirement planning, it will also enable users to retain and enhance their differentiation by being proactively trained in how to apply Timeline's latest capabilities to their clients. Advisers using Timeline can sign up for the [Digital Academy](#) to maximize their experience on the platform.

ABOUT TIMELINE

Timelineapp Tech Limited is the next-gen retirement income software used by financial planners to illustrate, create and manage sustainable withdrawal strategy for their clients. It is used by financial professionals in the UK, US and other developed countries across the world. Timeline's extensive empirical asset class and longevity data help financial advisers bring a client's retirement journey to life and answer their big retirement income questions through unique personalisation and engagement capabilities. Learn more at www.timelineapp.co. Follow Timeline on Twitter [@Timeline_Tech](https://twitter.com/Timeline_Tech).

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