

FOR PERSONAL INJURY LAWYERS



Islamic Wealth Management

in association with

tam 

ASSET
MANAGEMENT

PROVIDING YOUR CLIENTS WITH SPECIALIST ISLAMIC FINANCE ADVICE
AND AWARD-WINNING INVESTMENT MANAGEMENT

WHO WE ARE

Islamic Wealth Management (IWM) and TAM Asset Management (TAM) are two of the few companies in the UK offering fully compliant sharia investment portfolios. We understand that this is of utmost importance when considering personal injury claims and more often than not should be a tenet of your process when considering the investment options when you are acting as deputy for Islamic clients.

IWM and TAM have come together to combine their expertise in Islamic finance and investment management, to bring you an all-encompassing Sharia-compliant investment solution. Many people in the industry may not fully understand the needs of a client who requires a specialist investment offering to tie in with their beliefs, but we can offer this helping hand to ensure you continue to provide the highest level of service to your clients.



HOW WE CAN HELP YOU

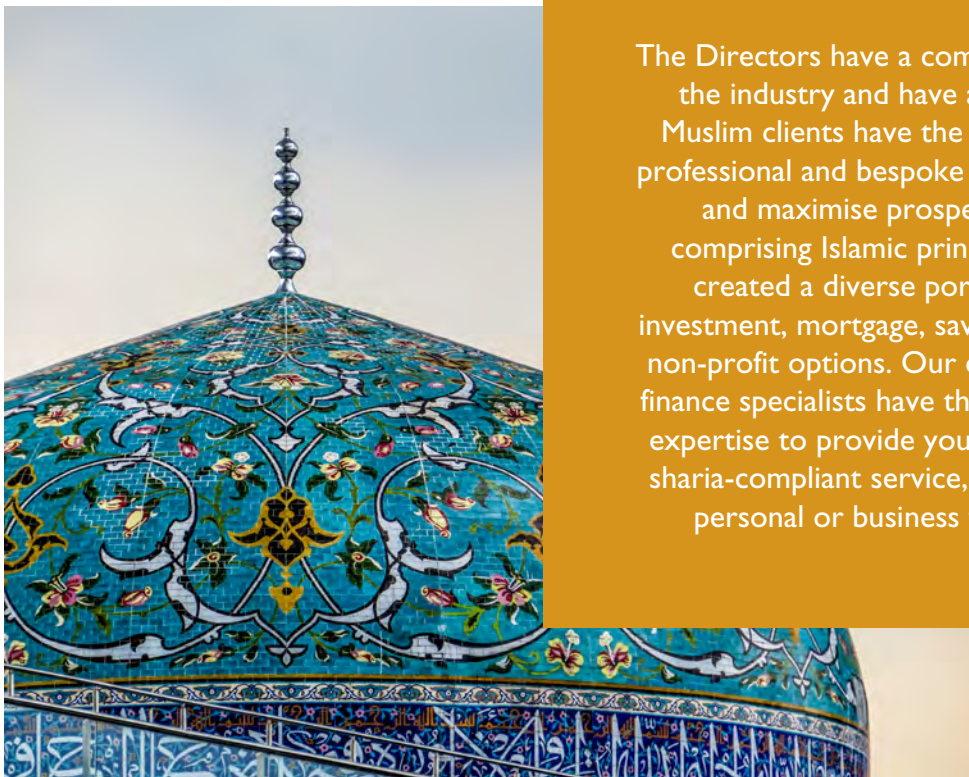
We understand that Trustees must, from time to time, review the investment of the trust and consider whether it should be varied. Trustees should consider whether the investment is suitable, given the range of investment opportunities on offer. As well as categories and diversification, trustees should consider the beneficiaries. As you know, you may also have a duty of care to check and ensure that the underlying investments are in line with any religious beliefs.

It is becoming more common for trustees to use discretionary managers to manage an investment portfolio, and where we see ethical becoming more commonplace, which can sometimes be requested by the beneficiary, the same applies to Sharia investments when taking into account the wishes and needs of the client. It may be prudent to ask more questions to make sure your investment choices do not disagree with their fundamental religious beliefs. This not only stands true at the outset, but more importantly when conducting reviews of investment opportunities for clients.



SPECIALIST ISLAMIC INVESTMENT ADVICE

For over two million Muslims living in the UK, conventional finance just doesn't work and at Islamic Wealth Management, we understand that normal investment opportunities are not compatible with Islamic law. We were established to provide a financial planning service to Muslim individuals and business owners based on Islamic principles derived from the Holy Quran and the prophetic Traditions of the Prophet Muhammed (pbuh).



The Directors have a combined 30 years in the industry and have a belief that all Muslim clients have the right to receive professional and bespoke financial guidance and maximise prosperity without comprising Islamic principles. We have created a diverse portfolio of halal investment, mortgage, savings, pension and non-profit options. Our dedicated Islamic finance specialists have the experience and expertise to provide you with a bespoke, sharia-compliant service, tailored to your personal or business finance goals.

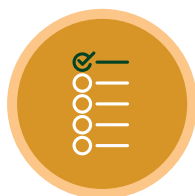
AWARD-WINNING INVESTMENT MANAGEMENT

TAM Asset Management is an award-winning discretionary investment manager with decades of experience in offering forward-thinking investment management solutions to clients around the world. Our Sharia service provides investors with a range of Islamic investment portfolios designed to protect and grow their wealth in a Sharia-compliant manner.

Our team of expert investment professionals follow a rigorous process when selecting funds for the TAM Sharia portfolios, conducting extensive research into the universe of sharia-compliant investments. The team will only select a fund that has proven to deliver on its sharia-compliant mandate, adhering to the stringent and comprehensive investment process which screens stocks to ensure only companies with Sharia-compliant business or activities are included.



5 year
performance
track record



5 risk-graded
portfolio
options



Diverse portfolio of
Sharia-Compliant
funds



Regular
monthly
contributions



Security of assets with
Pershing Securities
and Al Rayan bank



Exceptional
reporting
capabilities



Access to
award-nominated
charitable giving scheme



Invest directly or via an
ISA, Pension, Trust
or Bond

COMPLETE REPORTING SERVICE



IN-DEPTH PRE-INVESTMENT REPORTS

We can provide you with a risk questionnaire to complete with your client, to determine how much risk they are willing and able to take with their money, and therefore which risk graded investment portfolio is most suitable for them.

You can then request a pre-investment proposal for the chosen portfolio that will describe how the investment will be managed, outline the current strategy and fees, and provide simple account opening forms. Proposals also include a MifID II compliant ex-ante costs page.

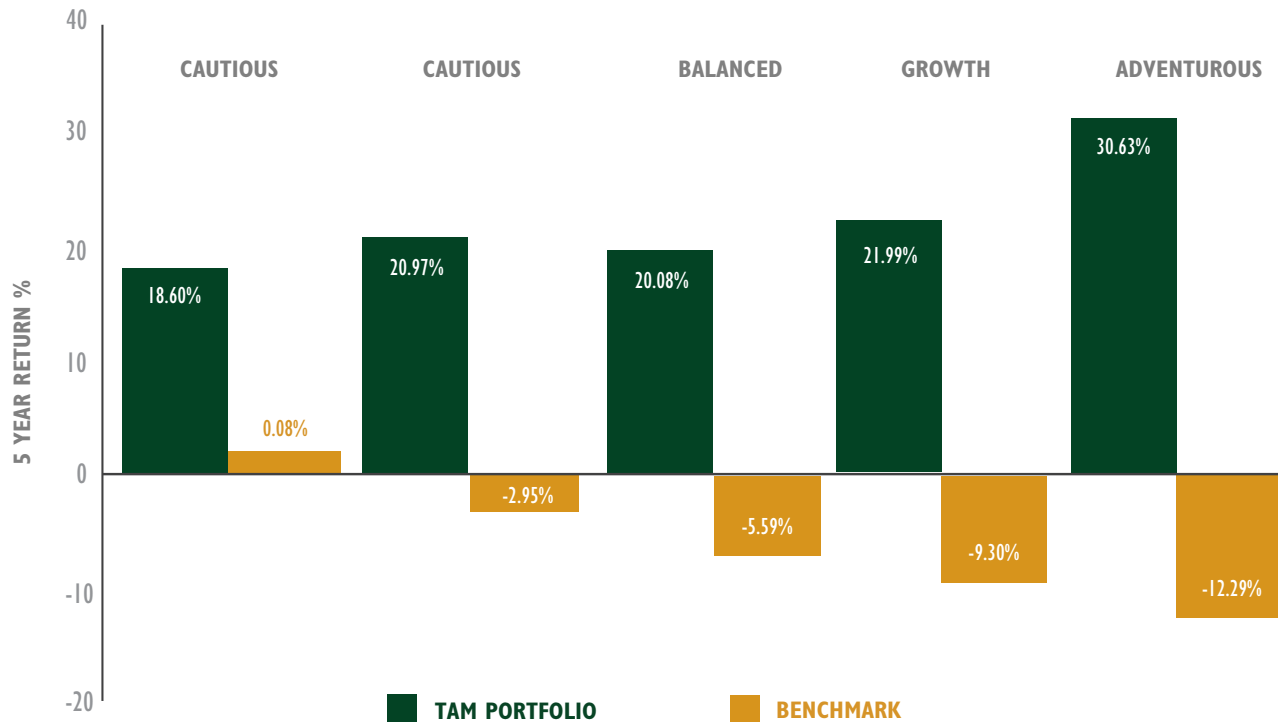
COMPREHENSIVE VALUATIONS

Everything you and your client could need to know about their portfolio is delivered through TAM's innovative online platform.

- Log in anytime, from anywhere, on any device
- Market commentary available 24/7
- Fully customisable, periodic reporting and information down to contract note level
- Immediate, internet-based valuations can be viewed online, printed or saved as a PDF

5 YEAR TRACK RECORD

Our TAM Sharia service celebrates a 5 year track record demonstrating performance across different market cycles and conditions. Our aim is simple; to maximise performance and outperform our benchmark with minimal risk.



Source: TAM Asset Management Ltd. TAM Sharia portfolio return from 1st April 2015 to 31st March 2020 net of TAM fees. Each benchmark is a composite of the FTSE All Share and Cash (1 Month Libor). Past performance is not a guide for future returns and investors may get back less than their original investment.

WHAT CLIENTS SAY

"Islamic Wealth Management was methodical in explaining various Shariah compliant investments with full knowledge of their performance and possible long term effects. I found this approach honest and professional which is a rare virtue nowadays I highly recommended Islamic Wealth Management."

Toufeeq Salar

Treasurer of Nishtarian Doctors Society UK

GET IN TOUCH

We're here for you whenever you're ready

Whether you'd like to know more about what we can do and what we stand for, or if you'd like to go ahead and discuss your Islamic investment options, just call us on 01 706 875 459 and let's see how we can help.

IWM and TAM have come together to bring you a holistic investment offering of combined financial advice and investment management. If you require solely financial advice or investment management, please use the contact details below.

Islamic Wealth Management Specialist Financial Advice

T: 01706 875 459

E: info@islamicwealthmanagement.co.uk

TAM Asset Management Award-Winning Investment Management

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