TAM CLIENT PROPOSAL REQUEST FORM

tam ASSET MANAGEMENT

FINANCIAL ADVISER DETAILS

Company:

Name:

Email:

Is this report required by a specific date?:

PORTFOLIO DETAILS

Client Name (Full name including title):

Life Company? (If yes please state):

Via a Trust / Pension? (If yes please state):

Individual Savings Account (ISA)? Yes ◯ No ◯ *(Please ensure the client signs the ISA declaration form provided with the requested proposal)*

Please indicate currency and approximate value of investment: ◯ £ ◯ € ◯ $ Value:

Please select which TAM portfolio you would like a proposal for (please select **one** only):

	PREMIER	ESG	SHARIA	PASSIVE
Defensive	◯	◯	◯	◯
Cautious	◯	◯	◯	◯
Balanced	◯	◯	◯	◯
Growth	◯	◯	◯	◯
Adventurous	◯	◯	◯	◯
Speculative	◯			

Income requirement:

Adviser fee requirements: INITIAL FEE: ______ % ONGOING FEE: ______ %

Please include details of any existing holdings and/or any special instructions below.

Please send completed forms to: portfoliorequest@tamassetmanagement.com

We aim to return your proposal within two working days. If your case is particularly urgent and you need it returned sooner then please let us know and we will endeavour to prioritise it for you.