

FINANCIAL ADVISER DETAILS

Company: \_\_\_\_\_

Name: \_\_\_\_\_

Email: \_\_\_\_\_ Is this report required by a specific date?: \_\_\_\_\_

PORTFOLIO DETAILS

Client Name: \_\_\_\_\_

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):

	active	enhanced passive	sustainable world	sharia	income
Liquidity Plus	<input type="radio"/>				
Defensive	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cautious	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Balanced	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Growth	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Adventurous	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Speculative	<input type="radio"/>				

INCOME REQUIREMENTS

For TAM Income portfolios only, you may choose natural income payments:  Quarterly

For all TAM portfolios, you may choose fixed income payments:  Quarterly  Six-monthly  Annually

Amount for fixed payment: \_\_\_\_\_

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](mailto: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.