

TAM AND THE 2023 DEFAQTO DFM SATISFACTION STUDY

The Defaqto DFM Satisfaction Study is recognised across the industry as one of the highest regarded studies of its kind. Now in its eighth year, the annual report collates feedback from the UK financial adviser market, who rate the DFMs that they work with based on the level of service that they provide to their clients. This year, we were delighted to see that TAM was the only DFM rated highly in all 14 performance categories - an accolade that outstrips many famous household names.



1

PROVIDER FINANCIAL
STRENGTH & RESOURCE



2

PROVIDER
BRAND



3

CLIENT
ON-BOARDING



4

EXISTING BUSINESS
ADMINISTRATION



5

INVESTMENT FLEXIBILITY
RANGE OF ASSETS



6

INVESTMENT FLEXIBILITY
RANGE OF OPTIONS



7

REMUNERATION
Rated #1



8

SERVICE
Rated #1



9

ONLINE
FACILITIES
Rated #1



10

ACCESSIBILITY
Rated #1



11

QUALITY OF STAFF
ADMINISTRATION
Rated #1



12

QUALITY OF STAFF
INVESTMENT
Rated #1



13

QUALITY OF
LITERATURE
Rated #1



14

EASE OF DOING
BUSINESS
Rated #1



Meeting our clients' needs is at the core of absolutely everything we do, and whilst acknowledgement like this is not definitive, it demonstrates that, away from our investment management skills, our duty to our clients is at the forefront of our entire operation. We are delighted with such positive feedback, which spurs us on even further to achieving the all-important goal of ensuring we are providing clients with the highest level of service possible at all times.

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