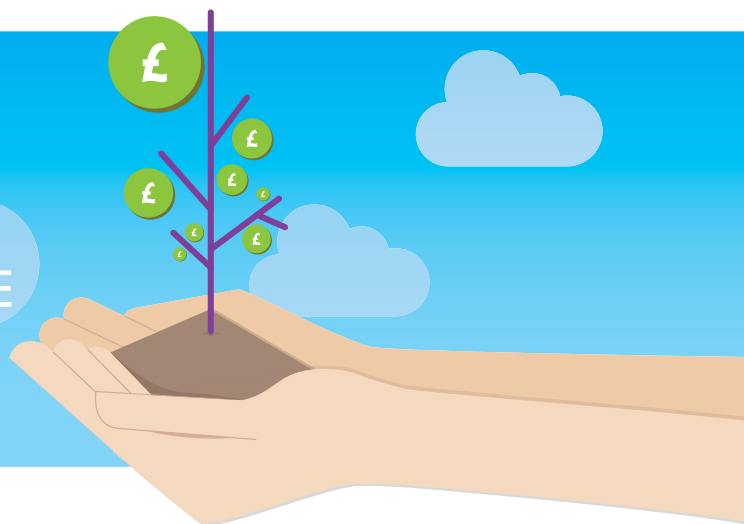




## THE YOU GIVE WE GIVE INITIATIVE



### EFFORTLESS CHARITABLE GIVING

You Give We Give (YGWG) is a unique initiative offered exclusively to TAM clients that provides you with a proven alternative to raising funds for your favourite cause.

TAM General Investment Account (GIA) and Individual Savings Account (ISA) clients have the opportunity to donate up to 20% of your annual portfolio gain to a charity of your choice, and TAM will match that donation with an equal percentage from our annual fee.

Your financial adviser can also choose to support your chosen charity by donating an equal percentage from their annual adviser fee.

### HOW IT HELPS

Clients participating in the initiative have raised over **£200,000** to support a wide variety of charities with the outstanding work that they do for their beneficiaries.

**YOU GIVE:** You decide what percentage of your annual portfolio gain to donate to charity when opening your account.

**WE GIVE:** TAM and your financial adviser will each donate an equal percentage from their total annual fee.

**TO CHARITY:** Your chosen charity will receive your donation, TAM's donation, plus possibly more from your financial adviser and HMRC Gift Aid.

### LET US SHOW YOU

You choose to give 20% of your annual portfolio gain to your local animal charity:

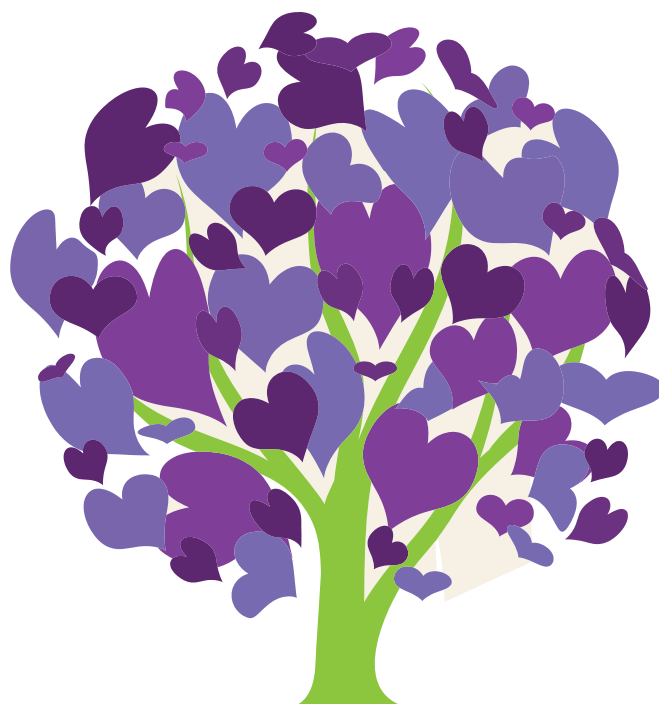
|   |             |
|---|-------------|
| Portfolio value 1 <sup>st</sup> January   | £100,000    |
| Portfolio value 31 <sup>st</sup> December | £105,000    |
| Annual Gain (Net)                         | £5,000 (5%) |

Your local animal charity will therefore receive:

|                                     |                             |
|-------------------------------------|-----------------------------|
| Your <b>£1,000</b> donation         | (20% of £5,000 annual gain) |
| TAM's <b>£84</b> donation           | (20% of 0.4% annual fee)    |
| Your adviser's <b>£210</b> donation | (20% of 1% annual fee)      |

If in any year you do not make a profit, you will not make a donation. However, TAM and possibly your financial adviser, will still donate to your chosen charity, providing them with a long-term sustainable income stream.

*Illustration only. Past performance is not a guide for future returns.*



**GETTING  
INVOLVED**



For more information and details on how to join the You Give We Give initiative, just get in touch with your financial adviser or visit [www.tamassetmanagement.com/charitable-giving](http://www.tamassetmanagement.com/charitable-giving)



# THE YOU GIVE WE GIVE INITIATIVE



## THE BENEFITS



### CHOICE

You can choose any UK registered charity to receive a donation.



### SIMPLICITY

A clear and convenient application and donation process.



### PARTNERSHIP

Increased donations through shared support from TAM and possibly more from your financial adviser.



### GIFT AID

If you are happy for your details to be provided, Gift Aid registered charities can increase your donation by 25%.



### FLEXIBILITY

At any time, you can change your charity of choice, the percentage you give or opt out completely.



### TRANSPARENCY

You will receive a letter each year outlining the donation and confirming the payment to the charity.



## DON'T JUST TAKE OUR WORD FOR IT

Here's what some of our  
YGWG clients say

*"I love the scheme, and although I already donate to charity, I like the fact I am still generating a return while donating."*

**Mrs Brebner**

*"I like the idea that the company matches the percentage, that it is tax deductible and that I choose the charity it goes to."*

**Mr Allen**

*"I love being able to contribute to this worthwhile scheme, 500miles was a charity I was unaware of and I look forward to receiving feedback on how my modest contribution helps this great cause."*

**Mrs McCarthy**

#### TAM Asset Management Ltd

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ASSET  
MANAGEMENT