TAM CLIENT PROPOSAL REQUEST FORM

ASSET MANAGEMENT

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):

	PREMIER	ESG	SHARIA	PASSIVE
Liquidity	◯			
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 return to : portfoliorequest@tamassetmanagement.com

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