

20th September 2013

TAM LAUNCHES ETHICAL PORTFOLIO RANGE EMPHASISING CHARITABLE GIVING



TAM Asset Management Ltd, the discretionary investment manager, is launching a range of ethical portfolios which allows investors a unique opportunity to donate to their favoured charity from a portfolio of socially responsible investments.

The “You Give, We Give” scheme forms part of the firm’s TAM Ethical product. Anyone investing in TAM Ethical can choose to give a percentage of any annual profit made by their individual portfolio to a charity. In an innovative move TAM will match the percentage given with the same percentage from its management fee.

Scott Murray, CEO of independent financial adviser, Virtuo Wealth said “TAM’s investment offering and “You Give, We Give” is the first product of its kind that we have seen. It’s a very exciting development in socially responsible investment and charitable giving”.

Where appropriate the chosen charity will also benefit from the HMRC’s Gift Aid scheme which will increase the value of the donation of UK taxpayers. The scheme also has the flexibility of allowing investors to change their charity of choice, alter the percentage donation or opt out completely if circumstances change.

Lester Petch, TAM Chief Executive said: “Many of our investors wish to do more than simply ensure their portfolio is managed on a socially responsible basis by supporting a charity of their choice. We believe our unique ‘You Give, We Give’ scheme allows them to do so and we are pleased to participate in this charitable innovation alongside our clients. Incorporating ethical beliefs or focussing on social responsibility with regard to investment decisions can be overwhelming which is why we have created a range of risk-profiled portfolios containing only investments that have been actively screened for their ethical credentials”

TAM complements its own research with external expert screening and ethically focused research and is a member of the UK Sustainable Investment and Finance Association.

Christian Holland, TAM Senior Investment Manager said “We are keen to dispel the myth that socially responsible investing means lower investment returns. Indeed, the sustainable growth so keenly sought by investors is often a by product of well run companies and managements with a long term view”.

TAM Ethical’s portfolios have five risk profiles from defensive to adventurous. Each investor receives a pre investment report, has access to the company’s innovative platform which allows instant valuations, performance information and asset exposure analysis and can add an international element depending on the risk profile selected.

The portfolio range can be utilised as an underlying asset for an ISA, SIPP, Pension, Workplace Pension, Trust or Life Assurance wrapped product. Mindful of RDR, TAM has set a competitive

annual management charge of 0.4% per annum. TAM is a member of the UK Sustainable Investment and Finance Association (UKSIF).

ENDS

For further information:

Lester Petch, Chief Executive
TAM Asset Management

020 7549 5650

Allan Noel-Baker
CityRoad Communications

07947 186693
020 7248 8010

About TAM Asset Management

TAM Asset Management is a product provider of discretionary investment management services and offers these products through professional financial advisers. The company can trace its roots back to 1938, from its humble beginnings as a stock broking firm in the City of London to becoming the discretionary asset management division of one of Europe's largest financial services firms. Today, TAM majority owned by its management is committed to preserving the values of innovation, honesty and client service which has allowed it to build its reputation as a fully transparent, high service provider of discretionary portfolio services.