

PRESS RELEASE

15th January 2014

TAM Asset Management teams up with London & Colonial to bring investors a socially responsible pension solution.

- Investments screened for environmental impact, social responsibility and animal welfare
- Investors given opportunity to participate in charitable donation scheme

TAM Asset Management has joined forces with London & Colonial to provide those investors seeking a retirement strategy that fully empathises with their ethical values with a socially responsible pension offering.

This socially responsible investment opportunity will offer investors the option to access, through London & Colonial's pension products, the broad selection of investment opportunities currently available through TAM Asset Management's comprehensive range of risk-rated socially responsible portfolios. The portfolio risk range of Defensive to Adventurous, have all been screened as to their socially responsible credentials.

Lester Petch, Chief Executive Officer, TAM Asset Management, said: "London & Colonial for many years now have been at the forefront of providing innovative and creative retirement solutions, and we are delighted to be working alongside them to bring to the market a risk graded socially responsible pension offering."

"Socially responsible investing is gathering momentum, and we are confident that our range of portfolios will provide investors with the perfect solution."

Adam Wrench, Head of Product and Business Development at London & Colonial, said: "The adoption of a more socially responsible approach to investing is becoming ever more popular as an increasing number of clients wake up to the realisation that effective long-term, sustainable investments have the potential to be just as profitable as the more traditional types.

"We firmly believe that this opportunity will offer clients an attractive and balanced combination of expertly managed investment options, whilst assuring that the socially responsible issues and ethical considerations that are important to us all are fully met."

The investment options offered by TAM Asset Management, and available through various London and Colonial products, have all been reviewed for their environmental impact, in terms of social responsibility, and after consideration for animal welfare.

Those clients who do opt to invest through the London & Colonial Multi Platform SIPP will automatically be given the opportunity to participate in TAM Asset Management's "You Give – We Give" charitable donation scheme. The scheme allows the client to donate part of their annual pension income to a pre-

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determined charity of their choice, with TAM Asset Management matching clients' donations with the same percentage from its asset management fees.

In addition, Investors will also be given the option to leave either part, or all, of any fund value remaining upon their death, to a charity or charities of their choice.

Any crystallised death benefit lump sum would normally be subject to a 55% tax charge, however where this payment is made to a charity then it will be totally tax exempt - thus increasing substantially the value of the "gift".

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NOTES TO EDITORS – About TAM Asset Management

1. **TAM Ethical** is the trading name of TAM Asset Management Ltd who is authorised and regulated by the Financial Conduct Authority.
2. **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.
3. TAM Ethical model portfolios are available in five risk-graded variants; Defensive, Cautious, Balanced, Growth and Adventurous Growth.
4. TAM Ethical subscribes to the "You Give, We Give" scheme to allow investors the option of donating a percentage of their annual gain to a charity of their choice. Uniquely TAM Ethical will donate an equal percentage from their annual management fee to the same charity.
5. TAM Ethical is a member of is a member of the sustainable investment and finance association (UKSIF)
6. The TAM Ethical Website can be found at: www.tamethical.com
7. **For further information please contact:**

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NOTES TO EDITORS – About London & Colonial

1. **London & Colonial** specialises in self-invested products for both UK residents and persons resident overseas.
2. The London & Colonial Group include:
 - a. London & Colonial Holdings Limited – UK parent company
 - b. London & Colonial Services Limited which is regulated by the UK Financial Services Authority and operates SIPPs and SSASs.
 - c. London & Colonial Assurance PLC which is regulated by the Gibraltar Financial Services Commission (matching UK standards) and which offers Open Annuities, QROP Annuities and Open Offshore Bonds
 - d. L&C (Administration Services 2) Limited and London & Colonial (Trustee Services) Limited which are both based in Gibraltar and offer the EU SIPP.
3. The London & Colonial **website** can be found at: www.londoncolonial.com
4. For further information, please contact:
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 - b. Fiona Bond Holt RP 020 8334 8354