



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:

Please indicate currency and approximate value of Portfolio: £ € \$ Value:

Please select which TAM Portfolio you wish a report for:

tam | active
 tam | sustainable world
 tam | sharia

Minimum investment **£7,500 / \$7,500 / €7,500**

	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Defensive	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cautious	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Balanced	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Growth	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Adventurous	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Speculative	<input type="radio"/>		

Please indicate the agreed fee structure for this portfolio proposal:

Ongoing Advisory Fee: _____ % per annum (max 1.00%)
 Initial Charge: _____ % deducted at inception (max 5.00%)
 or
 Establishment Charge: _____ % per annum charged over five years (max 1.00%).
 Early Withdrawal Penalty: When the client is charged an establishment charge they will also incur an early Withdrawal Penalty of the total value falling to zero over five years.

Please attach details of any existing holdings and add any special instructions, such as income requirement, below:

Please return to: CRM@tamint.com