

MANAGING YOUR INVESTMENTS WITH TAM

Professional investment
management working
alongside your
financial adviser



tam 

WHO WE ARE

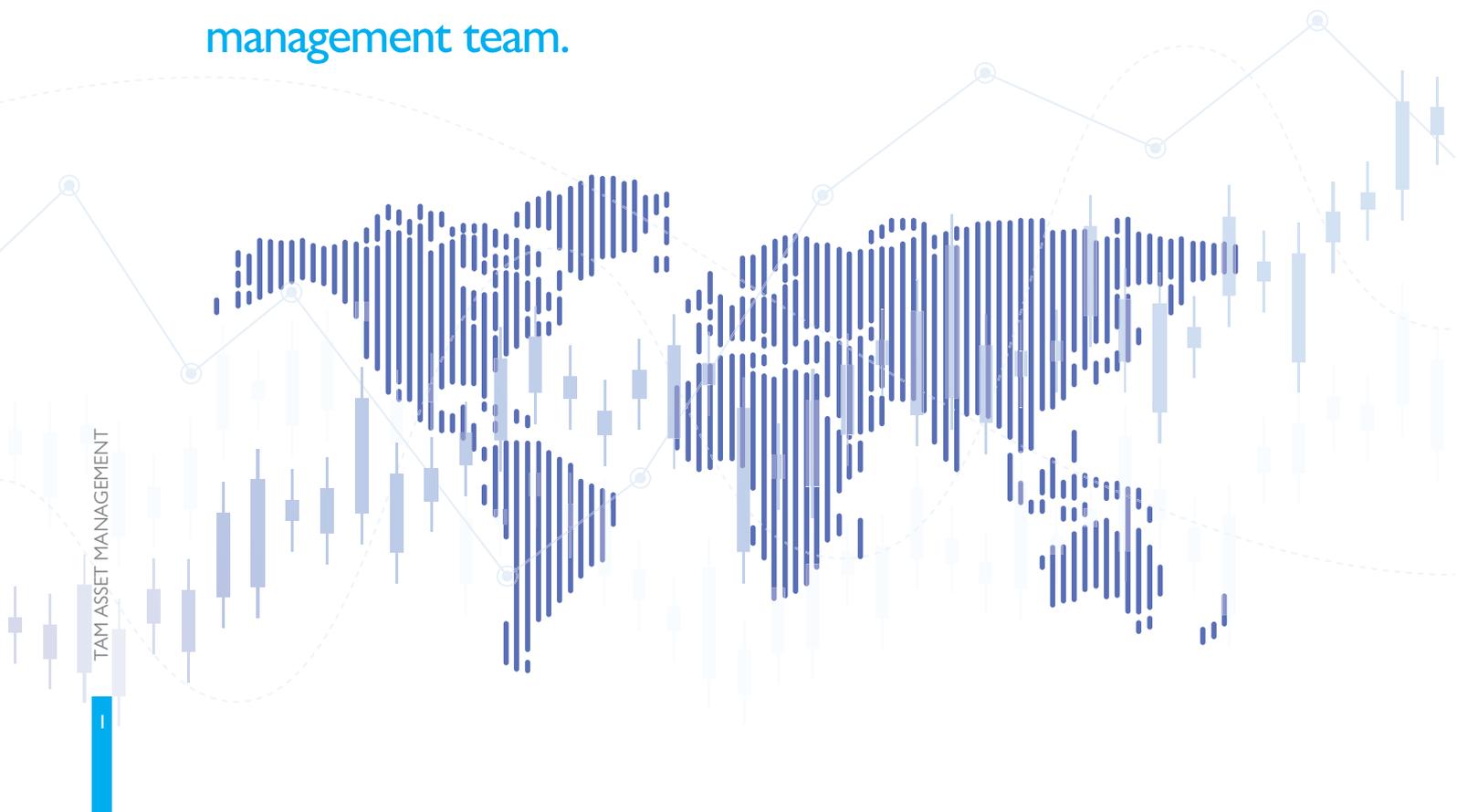
TAM Asset Management is an investment management firm specialising in discretionary portfolio management for financial advisers and their clients.

Originally established in the United Kingdom, the firm now works internationally with financial advisers, trustees, and family offices across multiple jurisdictions.

Our investment team focuses exclusively on managing diversified investment portfolios across global markets, applying a disciplined and long-term approach to investment management.

Financial advisers appoint TAM to manage investments on behalf of their clients so they can combine professional portfolio management with their own financial planning advice.

Clients benefit from the experience of both their financial adviser and a dedicated investment management team.



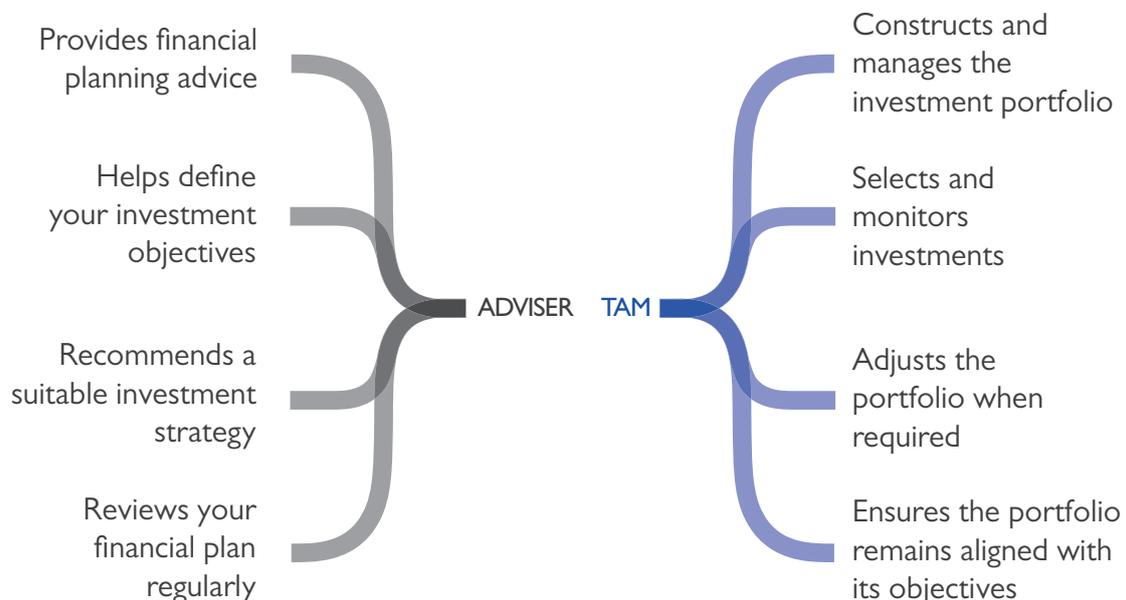
WORKING WITH YOUR ADVISER

Your financial adviser remains your primary point of contact and continues to guide your financial planning decisions.

They work with you to understand your financial circumstances, your long-term objectives, and your tolerance for investment risk.

Many advisers choose to work with specialist investment managers so their clients can benefit from dedicated portfolio management alongside financial planning advice.

Once an investment strategy has been agreed, TAM is responsible for managing the investments within the portfolio.



Financial planning and investment management working together

This structure allows your adviser to focus on your financial plan while your investments are

OUR INVESTMENT PHILOSOPHY

Successful investing requires discipline, diversification, and a long-term perspective.

Our investment approach focuses on three core principles.



Portfolios are diversified across different asset classes, regions, and sectors to reduce reliance on any single investment or market.



Investment decisions are based on long-term objectives rather than reacting to short-term market movements.



Our investment team continuously monitors portfolios and markets to ensure portfolios remain aligned with their objectives.

HOW PORTFOLIOS ARE CONSTRUCTED

Each portfolio is designed to match a specific level of investment risk and long-term objective.

Portfolios typically include a range of investments such as:

- Collective investment funds
- Exchange traded funds (ETFs)
- Other diversified investment strategies

This approach provides broad exposure to global markets while maintaining diversification and cost efficiency.



Portfolios are reviewed regularly and adjusted when necessary to ensure they remain aligned with their intended objectives.

WHAT THIS MEANS FOR YOU

When your adviser works with TAM you benefit from:

- Professional portfolio management
- Diversified global investments
- Continuous monitoring of markets and portfolios
- A structured and disciplined investment process
- Clear reporting on your investments



RISK
OVERSIGHT



GLOBAL
DIVERSIFICATION



PORTFOLIO
MONITORING



CLIENT
REPORTING

Your adviser remains available to review your financial plan and investment strategy whenever required.

OVERSIGHT AND PROTECTION

Your investments remain held with an independent custodian or investment platform.

TAM manages the portfolio but does not hold client assets directly.

This structure provides transparency and independent oversight of your investments.



Your adviser remains available to review your financial plan and investment strategy whenever required, ensuring your portfolio continues to support your long term financial goals.

A LONG-TERM PARTNERSHIP

Your financial adviser and TAM work together to support your long-term financial goals.

Your adviser continues to guide your financial decisions and remains your main contact.

TAM focuses on managing the investments within your portfolio in line with the agreed strategy.

Together, this partnership aims to provide disciplined investment management and long-term support for your financial future.

A partnership focused on long-term investment success



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Important information: This document is provided for information purposes only and does not constitute investment advice. Investment decisions should be made in consultation with your financial adviser.

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