

ADVISER DETAILS

Company: _____

Name: _____

Email: _____

Is this report required by a specific date? - If yes, please specify 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 a TAM Portfolio or complete the 'Other' section for alternative options.

MINIMUM INVESTMENT £7,500/\$7,500/€7,500	DEFENSIVE 20	CAUTIOUS 40	BALANCED 60	GROWTH 80	HIGH GROWTH 100
 active	<input type="radio"/>				
 enhanced passive	<input type="radio"/>				
 cash plus	<input type="radio"/>				

FINANCIAL DETAILS

Income Requirement: _____

Adviser Fee Requirements: INITIAL FEE: _____ % ONGOING FEE: _____ %

Other : please attach details of any existing holdings, portfolio valuations, specific portfolio requests or instructions.

PLEASE RETURN FORM TO: CRM@TAMINT.COM

Should you require any guidance completing this form please contact us by email: info@tamint.com or by telephone: +230 454 6400

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