

FINANCIAL ADVISER DETAILS

Name:

Phone Number:

Email:

Is this report required by a specific date?:

PORTFOLIO DETAILS

Client Name:

Please indicate currency and
approximate Regular Investment:☐

£

☐

\$

☐

€

Amount:

*Minimum investment for
RSP: £500 / \$500 / €500*

Investment Frequency:

Establishment Charge:

(Maximum USD/EUR/GBP 1000)

Annual Management Fee:

%

Additional Comments:

ASSET
MANAGEMENT
INTERNATIONALPlease return to: portfoliorequest@tamint.com