TAM ADVISOR SUPPORT

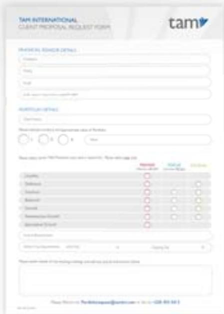
OPENING AN ACCOUNT 〉 DIRECT INVESTMENT

Opening a client account with TAM is simple and straight forward.

STEP 1

Complete our **Risk Profile Questionnaire** and **Proposal Request Form**

Our risk profile questionnaire is a useful tool to aid you in determining your clients risk profile.



Our proposal request form gathers all the initial information we need to generate a customized client pre-investment proposal.

STEP 2

We will return to you our comprehensive and customized **Pre-Investment Proposal**

Our pre-investment proposals are personalised to you and your client and outline:

- The chosen risk profile
- How we will manage the portfolio
- Our investment and research process
- Who we are and importantly who will be managing the portfolio
- Fees and costs
- Our market outlook
- A summary of all the funds within the portfolio

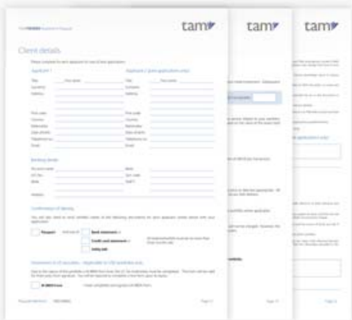
? *We aim to return your report within three days or earlier if urgent.*

STEP 3

Our **Account opening** forms are simple and are contained within the **Pre-investment proposal**

All you need send us is the completed and signed Costs, Client and Advisor pages plus the required client due-diligence documents.

We usually request soft copy to be sent with originals to follow. ?



Required KYC documents.

- Passport

Plus one of either:

- Bank Statement
- Credit card Statement
- Utility Bill

? *Documents must be certified and no more than 3 months old.*

STEP 4

We will promptly send you the clients account details and online log-in information

Once the account is opened it can be funded by electronic transfer or in-specie transfer.

? *Online portfolio valuations are then available 24 hours a day.*

VER 02/05/14

TAM ADVISOR SUPPORT 〉 +230 454 6400 +230 454 5413 support@tamint.com