

PRESS RELEASE

28th May 2014

IFAs REPORT INCREASED INTEREST IN ETHICAL & SRI Investment coupled with charitable giving the way forward

Discretionary fund manager TAM Ethical and Standard Life Investments co-hosted a seminar for IFAs at the City of London's Gherkin building marking the formal launch of TAM Ethical's "You Give, We Give" scheme, this week attended by some 35 IFAs.

Lester Petch, CEO of TAM Ethical foresees a revolution in the way investors can donate to their favoured charities from a portfolio of socially responsible investments, be they ISAs, pensions, multi-manager or low cost model portfolios.

The "You Give, We Give" scheme forms part of the firm's TAM Ethical product. Anyone investing in TAM Ethical can choose to give a percentage of any annual profit made by their individual portfolio to a charity, under the "You Give, We Give" scheme. In an innovative move TAM will match the percentage given with the same percentage from its management fee.

Two of the charities that are benefiting from "You Give, We Give" also outlined the importance of the scheme:

Jules Payne, Chief Executive of HEART UK – the Cholesterol Charity, which aims to raise awareness of the dangers of high cholesterol and cardiovascular disease said: "We are absolutely thrilled to be chosen as one of the partner charities for "You Give, We Give". We are a small charity with a big heart and welcome any new fundraising initiatives. This is a fabulous initiative giving people the opportunity to invest in an ethical way and donate if they so wish."

This view was echoed by John Milton of the Archway Project, also a small charity which helps rehabilitate young offenders in deprived Thamesmead, which has some of the highest crime rates in the country. The project, which is dependent on private funding, provides an environment in which offenders are taught to read and write, learn practical skills and make a fresh start away from gang cultures. It costs the tax payer £170,000 per annum to keep a young person in a young offenders' institution, he noted.

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NOTES TO EDITORS – About TAM Asset Management

1. **TAM Ethical** is the trading name of TAM Asset Management Ltd who is authorised and regulated by the Financial Conduct Authority.
2. **TAM Asset Management** is a product provider of discretionary investment management services and offers these products through professional financial advisers. The company can trace its roots back to 1938, from its humble beginnings as a stock broking firm in the City of London to becoming the discretionary asset management division of one of Europe's largest financial services firms. Today, TAM majority owned by its management is committed to preserving the values of innovation, honesty and client service which has allowed it to build its reputation as a fully transparent, high service provider of discretionary portfolio services.
3. TAM Ethical model portfolios are available in five risk-graded variants; Defensive, Cautious, Balanced, Growth and Adventurous Growth.
4. TAM Ethical subscribes to the **"You Give, We Give"** scheme to allow investors the option of donating a percentage of their annual gain to a charity of their choice. Uniquely TAM Ethical will donate an equal percentage from their annual management fee to the same charity.
5. TAM Ethical is a member of is a member of the sustainable investment and finance association (UKSIF)
6. The TAM Ethical Website can be found at: www.tamethical.com
7. **For further information please contact:**

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