

# TAM AND THE 2023 DEFAQTO DFM SATISFACTION STUDY

The Defaqto DFM Satisfaction Study is recognised across the industry as one of the highest regarded studies of its kind. Now in its eighth year, the annual report collates feedback from the financial adviser market, who rate the DFM's that they work with based on the level of service that they provide to their clients. This year, we were delighted to see that TAM was the only DFM rated highly in all 14 performance categories - an accolade that outstrips many famous household names.



**1**  
PROVIDER FINANCIAL  
STRENGTH & RESOURCE

**2**  
PROVIDER  
BRAND

**3**  
CLIENT  
ON-BOARDING

**4**  
EXISTING BUSINESS  
ADMINISTRATION

**5**  
INVESTMENT FLEXIBILITY  
RANGE OF ASSETS

**6**  
INVESTMENT FLEXIBILITY  
RANGE OF OPTIONS

**7**  
REMUNERATION  
*Rated #1*

**8**  
SERVICE  
*Rated #1*

**9**  
ONLINE  
FACILITIES  
*Rated #1*

**10**  
ACCESSIBILITY  
*Rated #1*

**11**  
QUALITY OF STAFF  
ADMINISTRATION  
*Rated #1*

**12**  
QUALITY OF STAFF  
INVESTMENT  
*Rated #1*

**13**  
QUALITY OF  
LITERATURE  
*Rated #1*

**14**  
EASE OF DOING  
BUSINESS  
*Rated #1*



Meeting our clients' needs is at the core of absolutely everything we do, and whilst acknowledgement like this is not definitive, it demonstrates that, away from our investment management skills, our duty to our clients is at the forefront of our entire operation. We are delighted with such positive feedback, which spurs us on even further to achieving the all-important goal of ensuring we are providing clients with the highest level of service possible at all times.

## GET IN TOUCH WITH US

+34 871 183 840 | [info@tameurope.com](mailto:info@tameurope.com)  
Port Adriano | Urbanización El Toro s/n | 07180 Calvià | Mallorca | Spain  
[www.tameurope.com](http://www.tameurope.com)



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