

FINANCIAL ADVISER DETAILS

Company: _____

Name: _____

Email: _____

Is this report required by a specific date?: _____

PORTFOLIO DETAILS

Client Name (Full name including title): _____

Life Company? (If yes, please state provider if known): _____

Via a Trust / Pension? (If yes, please state provider if known): _____

TAM Custody?: ☐ Yes ☐ NoPlease indicate currency and approximate value of investment: ☐ € ☐ £ Value: _____Please select which TAM Portfolio your wish a report for (please select **one** only):
 active

 enhanced
passive

 anchor

Liquidity Plus	☐		
Defensive	☐		☐
Cautious	☐	☐	
Balanced	☐	☐	☐
Growth	☐	☐	☐
Adventurous	☐	☐	

Do you have an interest in aligning your investment strategy with products that are sustainable: ☐ Yes ☐ No

Please be informed that by selecting "yes" for sustainability preferences, we are unable to fulfill your portfolio selection.

Income requirement: _____

Adviser fee requirements: Initial Fee: _____ % Ongoing Fee: _____ %

Please include details of any existing holdings and/or any special instructions below.

Please send completed forms to: portfoliorequest@tameurope.com

We aim to return your proposal within two working days. If your case is particularly urgent and you need it returned sooner then please let us know and we will endeavour to prioritise it for you.