VFS MODEL PORTFOLIO SERVICE

TAM CLIENT PROPOSAL REQUEST FORM

FINANCIAL ADVISER DETAILS

Company:

Name:

Email:

Is this report required by a specific date? :

PORTFOLIO DETAILS

Client Name:

Life Company - If yes please state:

Via a Trust / Pension - If yes please state:

Please indicate currency and approximate value of Portfolio: ○ £ ○ $ ○ € Value:

Please select which VFS Model Portfolio you wish a report for. Please select one only:

○ Conservative ○ Conservative Balanced ○ Balanced Growth ○ Growth ○ Liquidity Plus

Income Requirement:

Adviser Fee Requirements: INITIAL FEE: % ANNUAL SERVICE FEE: 1.00 % *If investing directly in the VFS model portfolio via TAM platform*

Please attach details of any existing holdings and add any special instructions below.

tam

Please return to: **portfoliorequest@tamint.com**