

Award-Winning Discretionary Investment Management

TAM Asset Management Ltd is an award-winning discretionary investment management company with decades of industry experience in offering forward-thinking portfolio management to individual clients and institutions around the world.

Our team of expert investment professionals believe that every investor should have access to actively managed, diversified investment portfolios regardless of their level of wealth. This principle forms part of the FCA's mission to ensure that no group of potential investors are denied access to investment services.

TAM do not believe in a one-size-fits-all approach and as such have over the years designed and developed a vast range of services for advisers to offer their varying clientele - from suites of dynamic, low-cost and passive investment portfolios, to suites of ethical and Sharia investment portfolios.



TAM PREMIER

Dynamic model investment portfolios

- 0.50% AMC
- 7 risk profiles
- Income and currency options (£, \$, €)
- 10 year track record
- £200,000 minimum investment



TAM FOCUS

Low-cost model investment portfolios

- 0.25% AMC
- 5 risk profiles
- Income and currency options (£, \$, €)
- 5 year track record
- £200,000 maximum investment



TAM ETHICAL

Ethical model investment portfolios

- 0.40% AMC
- 5 risk profiles
- 5 year track record
- No minimum/maximum investment



TAM SHARIA

Sharia model investment portfolios

- 5 risk profiles
- 5 year track record
- 0.50% AMC
- No minimum/maximum investment



TAM PASSIVE

Passive model investment portfolios

- 0.15% AMC
- 5 risk profiles
- No minimum/maximum investment



YOU GIVE WE GIVE

Pioneer in charitable giving

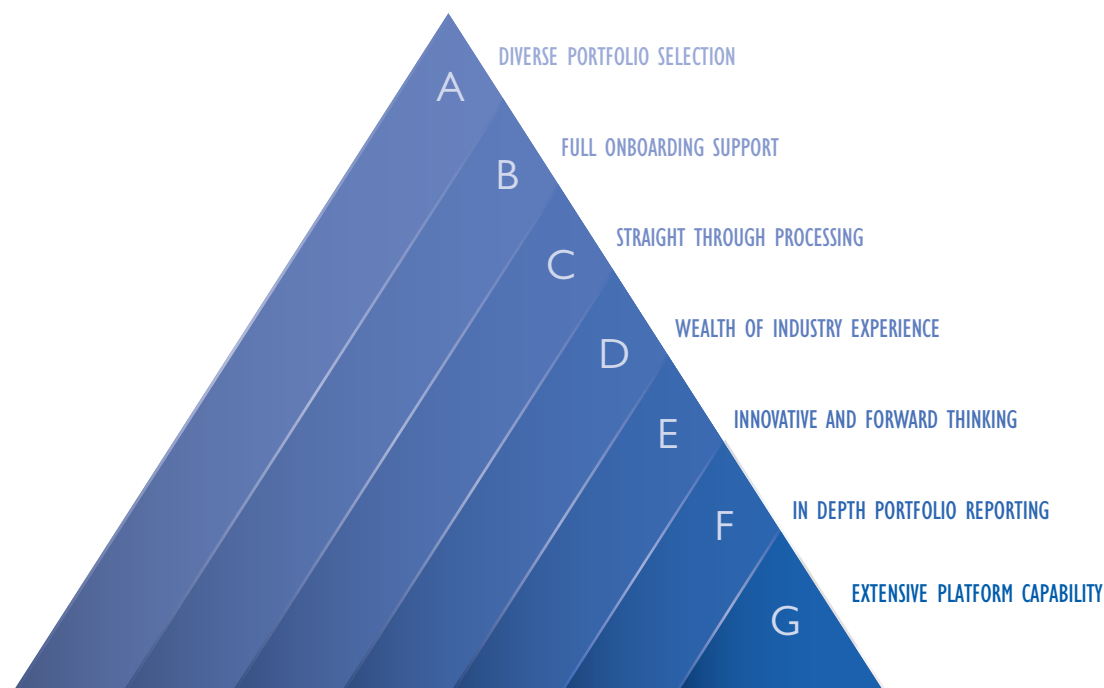
All TAM GIA and ISA clients have the exclusive opportunity to participate in our 'You Give, We Give' scheme, opting to donate a % of their annual portfolio gain to a charity of their choice, with additional donations from us.

TAM
PLATFORM



- Exclusive to TAM advisers and their clients
- 24/7 online access
- Full transparency
- Real time valuations and instant portfolio reporting

Why TAM?



By utilising our aggregated assets under management, TAM are able to offer our varied propositions at a competitive price through low platform fees, dealing charges and through the institutional share classes we gain access to for inclusion in our portfolios.

PORTFOLIO SERVICE	tampremier	tamfocus	tamethical	tamsharia	tampassive
Min./Max. Investment Amount	£200,000 minimum	£200,000 maximum	Any size	Any size	Any size
TAM AMC	0.50% + VAT	0.25% + VAT	0.40% + VAT	0.50% + VAT	0.15% + VAT
Platform Fee	0.25%	0.25%	0.25%	0.25%	0.25%
Total AMC and Platform Fee	0.85%	0.55%	0.73%	0.85%	0.43%
OTHER CHARGES					
Nominee and Administration Services	£50 per quarter	£12.50 per quarter	£25 per quarter	£25 per quarter	£12.50 per quarter
Execution	1% up to a maximum of £80 per transaction	1% up to a maximum of £12.50 per transaction	1% up to a maximum of £15 per transaction	1% up to a maximum of £80 per transaction	1% up to a maximum of £12.50 per transaction

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ASSET
MANAGEMENT

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CILWMA
CITY OF LONDON WEALTH MANAGEMENT AWARDS
TAM Asset Management
NOMINEE 2020

Investment Life & Pensions
Moneyfacts
Award 2019
COMMENDED

CILWMA
CITY OF LONDON WEALTH MANAGEMENT AWARDS
WINNER 2019
The IMVS Award for
Discretionary Wealth Management
TAM Asset Management

Professional Adviser
AWARDS
2019
COMMENDED
2019

INVESTMENT
WEEK
SUSTAINABLE INVESTMENT
AWARDS 2017
WINNER
2017

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