TAM EUROPE CLIENT PROPOSAL REQUEST FORM

EUROPE ASSET MANAGEMENT

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 or No):

Please indicate currency and approximate value of investment: ◯ € ◯ £ Value:

Please select which TAM portfolio you would like a proposal for (please select **one** only):

	tam	tam enhanced passive
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.