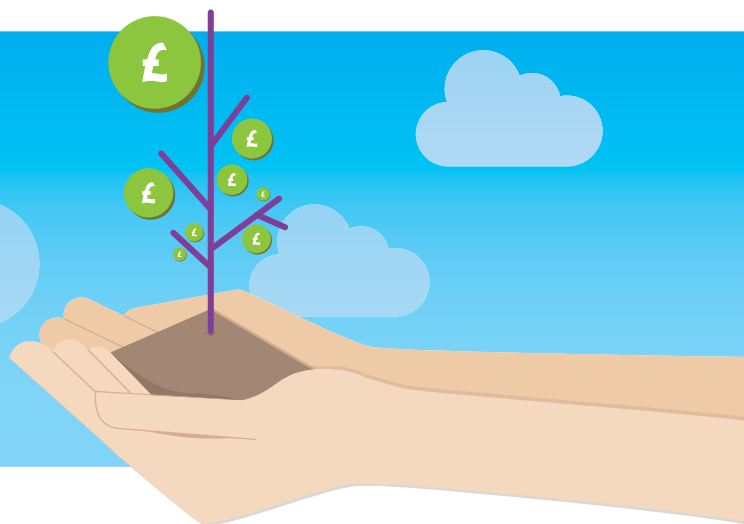


CHARITABLE GIVING AT TAM

WE ARE DEDICATED TO GIVING BACK



Every year we run a range of charity events and initiatives with our clients and partners. Together, we have raised over **£475,160** to support a variety of local and international causes, of which £235,211 has been donated via our unique **You Give We Give** initiative. We are incredibly proud of this achievement and send a heartfelt thank you to every individual who has helped us reach this milestone.



HOW DOES IT WORK?

YOU GIVE: You decide what percentage of your annual portfolio gain to donate to your nominated charity when opening your account.

WE GIVE: TAM, and possibly your financial adviser, will each donate an equal percentage from our fees.

TO CHARITY: Your nominated charity will receive your donation and TAM's donation, and possibly more from your financial adviser and HMRC Gift Aid.



WHAT IS YOU GIVE WE GIVE?

You Give We Give provides you with an effortless way to boost donations to your favourite cause.

Our unique initiative is offered exclusively to direct TAM General Investment Account (GIA) and Individual Savings Account (ISA) investors, providing you with the opportunity to donate up to 20% of your annual portfolio gain to a charity entirely of your choice.

TAM will then increase that donation by giving an equal percentage from our management fee, and your financial adviser can also choose to participate by donating an equal percentage from their ongoing fee.

LET US SHOW YOU

You choose to give 20% of your annual portfolio gain to your local animal rescue charity:

Portfolio value 1 st January	£100,000
Portfolio value 31 st December	£105,000
Annual Gain (Net)	£5,000*

Your local animal rescue charity will therefore receive:

Your £1,000 donation	(20% of £5,000 annual gain)
TAM's £84 donation	(20% of 0.4% annual fee)
Your adviser's £210 donation	(20% of 1% annual fee)

If in any year you do not make a profit then you will not make a donation. However, TAM, and possibly your financial adviser, will still donate from our fees, providing your nominated charity with a long-term income stream.

**Illustration only. Past performance is not a guide for future returns.*

GETTING INVOLVED



For more information about our charitable giving activities and initiatives, please visit our website: www.tamassetmanagement.com/charitable-giving

CHARITABLE GIVING AT TAM

WE ARE DEDICATED TO GIVING BACK



YOU GIVE WE GIVE BENEFITS



CHOICE

You can choose any UK registered charity to receive a donation.



PARTNERSHIP

Donations boosted through shared support from TAM, and possibly your financial adviser.



GIFT AID

If you are happy for your details to be provided, Gift Aid registered charities can increase your donation by a further 25%.



SIMPLICITY

A clear and convenient application and donation process.



TRANSPARENCY

You will receive a letter each year outlining the donation and confirming the payment to the charity.



FLEXIBILITY

At any time, you can change your nominated charity, the percentage you give or opt out completely.



DON'T JUST TAKE OUR WORD FOR IT

Here's what some of our clients say:

"I love the scheme, and although I already donate to charity, I like the fact I am still generating a return while donating."

Mrs Brebner

"I like the idea that the company matches the percentage, that it is tax deductible and that I choose the charity it goes to."

Mr Allen

"I love being able to contribute to this worthwhile scheme, 500miles was a charity I was unaware of and I look forward to receiving feedback on how my modest contribution helps this great cause."

Mrs McCarthy

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