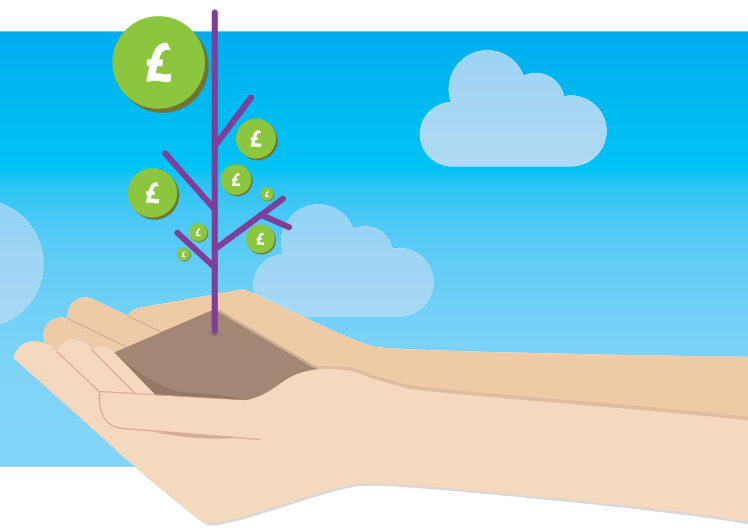




# THE YOU GIVE WE GIVE SCHEME



## EFFORTLESS CHARITABLE GIVING

The You Give We Give (YGWG) scheme is offered exclusively to clients of award-winning investment manager, TAM Asset Management (TAM).

The unique initiative provides General Investment Account (GIA) and Individual Savings Account (ISA) investors with the opportunity to donate up to 20% of their annual portfolio gain to a charity of their choice, and TAM will match that donation with an equal percentage from their annual fee.

Financial advisers can also support their clients' chosen charities by donating an equal percentage of their annual adviser fee.

## HOW IT HELPS

Since the scheme was launched in 2014, it has donated over £110,000 to support a wide variety of charities with the outstanding work that they do for their beneficiaries.

## HOW IT WORKS

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

**WE GIVE:** TAM and your financial adviser will each donate an equal percentage from their total annual fee.

**TO A CHARITY OF CHOICE:** Your chosen charity will receive your donation, TAM's donation, your financial adviser's donation and even more from HMRC Gift Aid.

## LET US SHOW YOU

Mrs. Johnson chooses to give 20% of her annual portfolio gain to Alzheimer's Research UK:

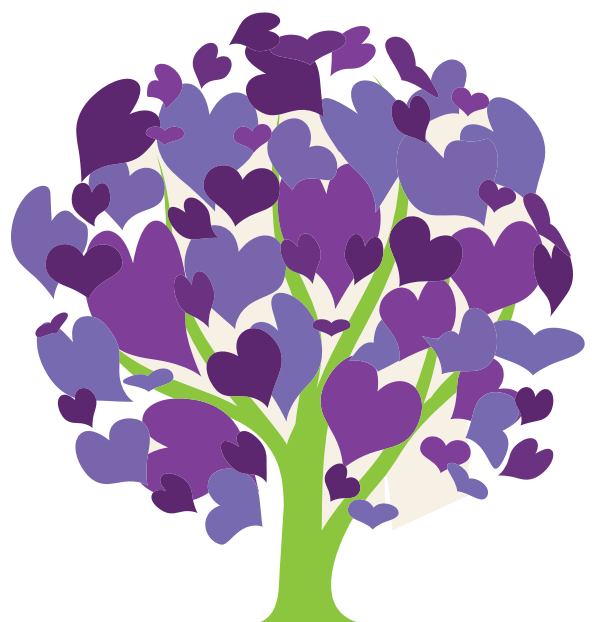
Portfolio value 1 <sup>st</sup> January	<b>£100,000</b>
Portfolio value 31 <sup>st</sup> December	<b>£105,000</b>
Annual Gain (Net)	<b>£5,000 (5%)</b>

Alzheimer's Research UK will therefore receive:

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

If in any year you do not make a profit, you will not make a donation. However, TAM and your financial adviser will still donate to your chosen charity, providing them with a long-term sustainable income stream.

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



**GETTING  
INVOLVED**



For more information and details on how to join the scheme, just get in touch with your financial adviser, or visit the website at [www.yougivewegive.com](http://www.yougivewegive.com)



# THE YOU GIVE WE GIVE SCHEME



## THE BENEFITS



### CHOICE

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



### SIMPLICITY

A clear and convenient application and donation process.



### PARTNERSHIP

Increased donations through shared support from TAM and your financial adviser.



### GIFT AID

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



### FLEXIBILITY

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



### TRANSPARENCY

You will receive a letter each year outlining the donation and confirming the payment to the charity. With your prior approval, when the donation is made to the charity they will also be provided with the details needed to claim Gift Aid.



## DON'T JUST TAKE OUR WORD FOR IT

Here's what some of our  
YGWG 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**

**GETTING  
INVOLVED**



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