



FRANKLIN TEMPLETON INVESTMENTS

FAMILY SOLUTIONS
INVESTMENT PLANS FOR LIFE GOALS

FORM FOR NEW INVESTORS

(Please use separate Transactions Form for each Scheme / Plan and Transaction)

Advisor ARN / RIA code	Sub-broker/Branch Code	Sub-broker ARN	Representative EUN	For office use only
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ARN-167174

E326136

The upfront commission on investment made by the investor, if any, shall be paid to the ARN Holder (AMFI registered distributor) directly by the investor, based on the investor's assessment of various factors including service rendered by the ARN Holder. **Applicable only if ARN is mentioned but EUN box is left blank:** I/We hereby confirm that the EUN box has been intentionally left blank by me/us as this transaction is executed without any interaction or advice by the employee/relationship manager/sales person of the above distributor/sub broker or notwithstanding the advice of in-appropriateness, if any, provided by the employee/relationship manager/sales person of the distributor/sub broker. **Applicable only if RIA Code is mentioned:** I/We hereby give you my/our consent to share/provide the transactions data feed/portfolio holdings/NAV etc. in respect of my/our investments under Direct Plan of all Schemes managed by you, to the SEBI-Registered Investment Adviser whose code is mentioned herein.

TRANSACTION CHARGES (Refer instructions and tick the appropriate option) Applicable for transactions routed through distributors/agents/brokers who have opted to receive transaction charges.

I am a first time investor in mutual funds (Rs.150 will be deducted). I am an existing mutual funds investor (Rs.100 will be deducted).

DECLARATION

Having read and understood the contents of the Statement of Additional Information (SAI) of Franklin Templeton Mutual Fund (FTMF), respective Scheme Information Document (SID); Key Information Memorandum (KIM), the Addenda issued therein till date (together referred as Scheme Documents) and after evaluating and acknowledging the risk factors, I / we hereby apply to the Franklin Templeton Trustee Services Pvt. Ltd., Trustees to the schemes of FTMF for units of scheme(s) of FTMF as indicated above, and agree to abide by all applicable laws and the terms and conditions mentioned in the Scheme Documents. Notwithstanding the generality of the aforesaid undertaking, I/We hereby confirm that (i) I/we am/are not a 'US Person' and are not applying for Units on behalf of any 'US Person' (ii) the money used for investment is my/our own and from legitimate sources (iii) the tax residency status (FATCA/CRS) and UBO details mentioned above are true and correct and (iv) the ARN holder has disclosed the details of commissions (in the form of trail commission or any other mode), offered by competing schemes of various mutual funds falling in the category of scheme(s) being recommended to me/us and I / we have not received nor been induced by any rebate or gifts, directly or indirectly in making this investment and are not in contravention or evasion of any applicable laws. I/We further agree to hold FTMF, Franklin Resources Inc. its subsidiary and associate entities including their employees, directors and key managerial persons (collectively referred as Franklin Templeton) harmless against any losses, costs, damages arising out of any actions undertaken or activities performed by them in accordance with the Scheme Documents and for any consequences in case of any of the above particulars being false, incorrect or incomplete or for the activities performed by them in good faith or on the basis of information provided by me/us as also due to my/our not intimating / delay in intimating such changes. I/We hereby authorise Franklin Templeton to use, disclose, share, remit in any form, mode or manner, all / any of the information provided by me / us, including all changes, updates to such information as and when provided by me / us alongwith the details of investment made by me / us, to any of its agents, service providers, representatives or distributors or any other parties located in India or outside India or any Indian or foreign governmental, statutory, regulatory, administrative or judicial authorities / agencies without any obligation of advising / informing me/us of the same. I/We hereby agree to keep the information provided to Franklin Templeton updated and to provide any additional information / documentation that may be required by Franklin Templeton, in connection with this application. I/We hereby provide my/our consent in accordance with Aadhaar Act, 2016 and regulations made thereunder, for (i) collecting, storing and usage (ii) validating/authenticating and (iii) updating my/our Aadhaar number(s) in accordance with the Aadhaar Act, 2016 (and regulations made thereunder) and PMLA. I/We hereby provide my consent for sharing/disclosing of my/our Aadhaar number including demographic information with the asset management companies of SEBI registered mutual fund and their Registrar and Transfer Agent (RTA), KRA(s) & Central KYC Registry for the purpose of updating the same in the folios linked to my/our PAN.

Date _____	Place _____
_____	_____
Sole / First Unit Holder	Second Unit Holder
_____	_____
_____	Third Unit Holder

MY DETAILS (To be filled in Block Letters. Please provide the following details in full; Please refer instructions)

My Name (Should match with Aadhaar Card) _____ **PAN/PEKRN** (1st Applicant) _____ **KYC**

My Guardian's Name (if minor)/POA/Contact Person _____ **PAN/PEKRN** (Guardian/POA) _____ **KYC**

On behalf of Minor (* Attach Mandatory Documents as per instructions). **Date of Birth** Minor's / / **Date of Birth** / **Guardian named is :** **Proof attached *** **Father** **Mother** **Court Appointed**

JOINT APPLICANTS (IF ANY) DETAILS

Mode of Operation : **Single** **Joint** **Either or Survivor(s)** [Default]

2nd Applicant Name (Should match with Aadhaar Card) _____ **PAN/PEKRN** (2nd Applicant) _____ **KYC**

3rd Applicant Name (Should match with Aadhaar Card) _____ **PAN/PEKRN** (3rd Applicant) _____ **KYC**

INVESTMENT DETAILS: I/We would like to invest in the following schemes to meet my/our life goals (Please read Product labeling details available on cover page of KIM)

GOAL	Retirement	Child's Future	Wealth Builder
Additional Details		e.g. Deepa's Marriage	e.g. Home/Car
Scheme Name / Plan	Amount in ₹ (SIP: per Installment)	Amount in ₹ (SIP: per Installment)	Amount in ₹ (SIP: per Installment)
<input type="checkbox"/> Lumpsum <input type="checkbox"/> SIP Plan: <input type="checkbox"/> Regular <input type="checkbox"/> Direct <input type="checkbox"/> Growth <input type="checkbox"/> Dividend Payout <input type="checkbox"/> Dividend Reinvestment			
<input type="checkbox"/> Lumpsum <input type="checkbox"/> SIP Plan: <input type="checkbox"/> Regular <input type="checkbox"/> Direct <input type="checkbox"/> Growth <input type="checkbox"/> Dividend Payout <input type="checkbox"/> Dividend Reinvestment			
<input type="checkbox"/> Lumpsum <input type="checkbox"/> SIP Plan: <input type="checkbox"/> Regular <input type="checkbox"/> Direct <input type="checkbox"/> Growth <input type="checkbox"/> Dividend Payout <input type="checkbox"/> Dividend Reinvestment			
<input type="checkbox"/> Lumpsum <input type="checkbox"/> SIP Plan: <input type="checkbox"/> Regular <input type="checkbox"/> Direct <input type="checkbox"/> Growth <input type="checkbox"/> Dividend Payout <input type="checkbox"/> Dividend Reinvestment			
Total Investment per Goal			
Total Investment in all Goals	(in figures)		

Amount Invested _____ (DD Charges) _____ **Net Amount** _____

Payment Details Cheque/DD No. _____ Bank _____

Branch _____ Bank A/C No. _____

Please register my Pay-in bank details also as one of the banks in my/our account/folio based on the payment instrument attached. Please refer the instruction for supporting document required for registering Bank Mandate. (Please tick if applicable) I / We do not wish to register this bank as additional bank in my/our account details.

ACKNOWLEDGEMENT SLIP

Received from _____ Sl. No. _____

Pin _____

Amount _____ Cheque/DD No. _____ Date _____ Bank and Branch details _____

