



**FRANKLIN TEMPLETON
INVESTMENTS**

APPLICATION FORM FOR NEW INVESTORS

(Please read Product labeling details available on cover page and instructions before filling this Form)

Advisor ARN / RIA code	Sub-broker/Branch Code	Sub-broker ARN	Representative EUIN	For office use only
ARN-77785			E157201	

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 EUIN box is left blank:** "I/We hereby confirm that the EUIN 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

Date _____ Place _____

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 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 (PITCA/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.

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 :** 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

MY CONTACT DETAILS (As per KYC records. To be filled in Block Letters)

Email ID (in capital) _____ **Address Type (Mandatory)**
 a. Residential & Business
 b. Residential
 c. Business
 d. Registered Office

Mobile +91 _____ **Tel** (STD Code) _____

Address _____

Landmark _____

City _____ **Pin Code** (Mandatory) _____ **State** _____

MY INVESTMENT DETAILS (Cheque/DD should be in favour of "Scheme Name". Default plan/Option will be applied in case of no information, ambiguity or discrepancy)

Full Scheme/Plan/Option	Amount / Each SIP Amount	Payment Mode	Drawn on Bank/Branch
<input type="checkbox"/> Lumpsum <input type="checkbox"/> SIP Plan: <input type="checkbox"/> Regular <input type="checkbox"/> Direct	Rs. _____ Less DD charges _____	<input type="checkbox"/> Cheque/DD No. _____ <input type="checkbox"/> RTGS <input type="checkbox"/> NEFT <input type="checkbox"/> Funds transfer	Name/Branch: _____ A/c no. _____
Option: <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	Rs. _____ Less DD charges _____	<input type="checkbox"/> Cheque/DD No. _____ <input type="checkbox"/> RTGS <input type="checkbox"/> NEFT <input type="checkbox"/> Funds transfer	Name/Branch: _____ A/c no. _____
Option: <input type="checkbox"/> Growth <input type="checkbox"/> Dividend Payout <input type="checkbox"/> Dividend Reinvestment			

Payment through NACH (Attach NACH form) | Documents attached to avoid Third Party Payment Rejection, if applicable: Bank Certificate, for DD Third Party Declarations

IF YOU OPT TO START TWO SIP'S, THE BELOW MENTIONED DETAILS WILL BE APPLICABLE FOR BOTH THE SIP'S. **My Additional SIP Details**

SIP Date: (If left blank 10th will be considered as the default date) | **Investment Frequency** Monthly (default) Quarterly

SIP Period Start Date / / End Date Continue Until Cancelled OR / / **First SIP Cheque Date:**

Step-up my SIP annually by: Increase in %: _____ (in multiples of 5%) (Amount invested will be rounded off to the nearest Rs. 100)

or Increase in Rupee Value: _____ (in multiples of Rs. 500)

ACKNOWLEDGEMENT SLIP

Sl. No. _____

Received from _____	_____	_____	_____	_____
Scheme Name	Plan/Option	Payment Details		
_____	_____	Amount _____	Cheque/DD No. _____	Date _____
_____	_____	Bank and Branch details _____	_____	_____
_____	_____	Amount _____	Cheque/DD No. _____	Date _____
_____	_____	Bank and Branch details _____	_____	_____



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

Table with 5 columns: Advisor ARN / RIA code, Sub-broker/Branch Code, Sub-broker ARN, Representative EUIN, For office use only. Values: ARN-77785, E157201

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

My Name, My Folio Number, Scheme (Account Number)

SIP DETAILS (Please note that 30 Business days are required to set up the Auto debit. Default plan/Option will be applied incase of no information, ambiguity or discrepancy)

Scheme Name/Plan/Option, Each SIP Amount (minimum Rs. 500), SIP Date, SIP Period, Investment Frequency, Drawn on Bank/Branch, Step-up my SIP annually by, Bank Name, Account No.

DECLARATION & SIGNATURES (To be signed as per Mode of Holding)

Tick here only if ARN is mentioned but EUIN box is left blank: I/We hereby confirm that the EUIN 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.

Signature lines for Sole / First Unit Holder, Second Unit Holder, Third Unit Holder



SIP Auto Debit Form

ADF

UMRN, Date

Sponsor Bank Code, Utility Code

Tick (v) CREATE, MODIFY, CANCEL

I/We hereby authorize Franklin Templeton Mutual Fund to debit (tick v) SB CA CC SB-NRE SB-NRO Other

Bank a/c number

with Bank, Bank Name, IFSC, or MICR

an amount of Rupees

FREQUENCY, DEBIT TYPE

Reference 1, Reference 2, Folio Number, Application Number, Phone No., Email ID

PERIOD, From, To, I agree for the debit of mandate processing charges by the bank whom I am authorizing to debit my account as per latest schedule of charges of the bank.

Or, Signature Primary Account holder, Signature of Account holder, Name as in Bank records

This is to confirm that I/we have carefully read, understood and agree to abide by the Terms and conditions and instructions. I am authorizing Franklin Templeton to debit my account. I/We are authorized to cancel/amend this mandate by appropriately communicating the cancellation/ amendment request to Franklin Templeton or the bank where I have authorized the debit'

ACKNOWLEDGEMENT SLIP FOR SIP THROUGH AUTO DEBIT (To be Filled In by Investor)

Investor's Name, Customer Folio, Account No., SIP Amount (Rs.), Frequency, Scheme, Franklin Templeton Investor Service Centre Signature & Stamp