



Gross Annual Income Details (please tick) Mandatory: Income range per annum:  Below Rs. 1lac  1-5 lac  5-10 lac  10-25 lac  25-1cr  
 1 cr- 5 cr  5cr- 10cr  > 10 cr or Net-wo

Please tick, if applicable, for the applicant / any authorised signatories / Promoters / Partners / Karta / Trustees / Whole-time directors:  
 Politically Exposed Person (PEP)  Related to a Politically Exposed Person (PEP)

Name of Guardian

Country of birth  Date of Birth#  Gender:  Male  Female

PAN No. (Mandatory)\$  Enclosed:  PAN Card Copy  Proof of Identity & Address ^  Proof of KYC\*

Status:  Resident Individual  NRI/PIO  Others (Please specify)

N

Country of Tax Residence (Refer instruction)

Foreign Tax ID Number

If you are not resident in any country (except India) for tax purposes, please tick this box

Occupation (please tick any one and give brief details) Mandatory:  Private Sector  Public Sector  Government Service  Business  
 Professional  Agriculturist  Retired  Housewife  Student  Others

Gross Annual Income Details (please tick) Mandatory: Income range per annum:  Below Rs. 1lac  1-5 lac  5-10 lac  10-25 lac  25-1cr  
 1 cr- 5 cr  5cr- 10cr  > 10 cr or Net-wo

Please tick, if applicable, for the applicant / any authorised signatories / Promoters / Partners / Karta / Trustees / Whole-time directors:  
 Politically Exposed Person (PEP)  Related to a Politically Exposed Person (PEP)

Relationship with Minor  Father  Mother  Legal Guardian   
 (Please specify relationship)

#### Mode of Operation

Single  Joint  Either or Survivor(s)

#### Power of Attorney (POA) Details

Name of POA Holder  Date of Birth

Enclosed  Proof of KYC\*  Proof of Identity & Address ^  PAN Card Copy PAN\$(Mandatory)

Status:  Resident Individual  NRI/PIO  Others (Please specify)  Gender:  Male  Female

^ Allowed only for investments through Micro investment route in lieu of KYC and PAN. \*Please provide copy of the KYC acknowledgement issued by KRA (Mandatory for all Investors (including Sikkim Resident) irrespective of the amount of investment). For investments through Micro investment route, address proof and identity proof is required to be submitted #Date of Birth and Document proof – mandatory for investments through Minors and investments in FIPEP (in FIPEP, only individuals may invest). \*\*Please provide following documents for evidencing the relationship:- Father/Mother – Photocopy of the certificate mentioning the date of birth of the Minor and Parent's Name; Legal Guardian – Court Order. In case of investments held in the name of a minor, no joint holders / nomination will be registered. The minor, acting through the guardian, should be the first and sole holder in the Folio/Account.

#### Address (Mandatory if you have not completed your KYC process via CVL, else the address of the 1st Holder as registered with CVL will be automatically updated in our records)

City  State  Country  Pincode

Overseas Address for NRIs/PIOs

City  State  Country  Pin/Zip

#### Contact Details (Please provide your contact details even if you have already submitted your KYC acknowledgement)

If the Applicant is Sole Proprietorship Firm, please provide the name of Sole Proprietor. If HUF, please provide the name of Karta. In case of other Non-Individuals, please provide the details of Contact Person.

Name

Tel      
STD Code Office Residence Fax

Email  Mobile

#### Bank Details (Mandatory - For new investors) - For payment through electronic mode, please attach a cancelled cheque leaf or a copy of the cheque.

Bank Name   
(Do not abbreviate)

Account No.  Branch/City

Please provide the full account number

Branch

Address  Pin

Account type For Residents  Savings  Current | For Non-Residents  NRO  NRE |  Others

Repatriable  Non-Repatriable

\*RTGS code  \*NEFT code  \*MICR code

\*Note: For more details on RTGS/NEFT/MICR codes, please refer detailed instructions on page no. 13.

Please provide a cancelled, signed cheque of the bank account you wish to register. The registered bank will be the default bank and all redemptions / dividends proceeds will be processed into default bank through electronic payment facility. I/We DO NOT wish to avail Electronic Payment Facility (Please tick) . Please verify and ensure the accuracy of the bank details provided above and as shown in your account statement. Franklin Templeton cannot be held responsible for delays or errors in processing your request if the information provided is incomplete or inaccurate.  Multiple Bank Registration Form provided.

**I/We would like to invest in**

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

Investment Details					
Fund Name	Plan/Option	Amount Invested	Net Amount Paid	Payment Details	
				Cheque/DD No.	Bank, Bank A/c No. and Branch
		Less DD Charges:			

Separate cheque/demand draft required for each investment, drawn in favour of scheme name (see point 4 on page 5). Please fill up the scheme name(s) and the plan/option you may refer to the KIM for more details. Investors in Franklin India Pension Plan are requested to also fill in the option exercise form available at the ISC.

Please use separate application forms for Lumpsum and Systematic Investment Plan, please fill the SIP Auto Debit (ECS/Direct Debit) form alongside and submit it together with the application form. If you have an existing account in the scheme mentioned above, this purchase will be treated as an additional purchase in the same account. If you prefer to have a new account in the same scheme please tick here

**Mandatory for Non-Individual Applicants**

**Ultimate Beneficiary Owner Details (Refer instruction)**

- Applicant is the Ultimate Beneficial Owner(s) of this investment
- Applicant is not the Ultimate
- ^ Where no box

**FATCA**

Please tick the relevant box below, even if Country of Tax Residency is India

- Form W8 BEN-E / Specified declaration enclosed
- Unable to Provide [Franklin Templeton will contact you in due course to confirm your FATCA Status]

^ Where no box is ticked, the second statement will be taken as the default implying that the applicant/investor currently is unable to confirm FATCA status and will confirm the same in future.

**Third Party Payment Documents**

**KYC Proof enclosed** (tick below as appropriate)

- Person making payment  Payment by Guardian  Payment by Parents/Grand-Parents/related persons (other than Guardian) on behalf of a Minor in consideration of natural love and affection or as gift  Custodian on behalf of an FII or a Client  Payment by Employer on behalf of Employee - under Payroll deductions Declaration - Attached  Declaration from Beneficiary  Declaration from Third Party (Custodian, Employer, Guardian or Parents/Grand-Parents/related persons (other than Guardian) on behalf of a minor in consideration of natural love and affection or as gift).
- DD against Cash (Please attach):  Banker Certificate
- DD against Debit Bank (Please attach):  Banker Certificate or  A copy of the passbook/bank statement evidencing the debit for issuance of a DD or  Challan

**Franklin Templeton 'Easy' Services**

1. **Franklin Templeton Easy e-Update:** Receive account statements, annual reports and other information instantly by Email \*

Email Address:

\_\_\_\_\_

- I / We wish to receive the above by email
- I / We do not wish to receive the above by email

2. **Franklin Templeton Easy Web:** Access your account and transact online. Register online for Easy web by visiting our website [www.franklintempletonindia.com](http://www.franklintempletonindia.com)

3. **Franklin Templeton Easy Call:** Just call 1800 425 4255 or 6000 4255 to access your account using TPIN \_\_\_\_\_  Yes, I would like to receive my TPIN

4. **Franklin Templeton Easy Mobile:** Get instant SMS alerts to confirm your transactions \*  
Mobile Number \_\_\_\_\_

I/We wish to register for SMS updates on my/our mobile phone.  Yes  No

\* Note: Where the investor has not opted for any option or has opted for both options, the application will be processed as per the default option, i.e., receive the account statement, annual report and other correspondence by E-mail and receive SMS updates on mobile.

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