

Advisor ARN		Representative EUIN	
Sub-broker ARN		Sub-broker/Branch Code	

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.

"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: First Holder/Sole applicant  Second Holder  Third Holder

For Office Use Only

I am an Existing Investor. I wish to Use this Form for  ADDITIONAL PURCHASE  REDEMPTION  
 SWITCH  CHANGE OF BANK DETAILS  E-MAIL COMMUNICATIONS  ONLINE ACCOUNT ACCESS  
 SIP/SWP  NOMINATION DETAILS  KNOW YOUR CUSTOMER (KYC)

Trxn Ref No. \_\_\_\_\_

**Existing Unitholder Information**

Name of Sole / First Account holder (Leave space between first/middle/last name) \_\_\_\_\_ Account No. \_\_\_\_\_  
 \_\_\_\_\_ Customer Folio No. \_\_\_\_\_

**Know Your Customer (KYC)**

KYC Compliance is mandatory for all investors irrespective of the amount of investment including guardian in case of minor and POA holders. Please provide a copy of the KYC acknowledgement issued by CVL/KRA. Investments without valid KYC may be rejected. If you have already provided the KYC acknowledgement for this folio, you need not provide the same again.

Please Provide your PAN details if you have not registered them before

Holder	PAN	Proof of KYC enclosed	PAN Card Copy Enclosed	Proof of Identity & Address <sup>§</sup>
Sole/First	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Second	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Third	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
POA/Guardian	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Mandatory Enclosures: PAN Card copy or Copy of KYC acknowledgment. Transactions not including these mandatory enclosures may be rejected

<sup>§</sup>Please attach proof of photo identity and address for investments only through Micro SIP.

**Additional Purchase Order (Please read Product labeling details available on cover page of the SID & KIM and instructions before filling this Form.)**

Please fill the details of the goal(s), scheme name(s) and investment amount below:

Goal			Retirement	Child's Future 1	Wealth Builder 1	Child's Future 2	Wealth Builder 2	
Additional Details				e.g. Deepa's Marriage	e.g. Home/Car	e.g. Sania's Education	e.g. Vacation	
	Fund / Scheme Name	Account Number (only for existing investor)	Plan/Options (Please tick (✓) anyone)	Amount in Rs.	Amount in Rs.	Amount in Rs.	Amount in Rs.	Amount in Rs.
Regular Investment	1)		<input type="checkbox"/> Growth <input type="checkbox"/> DR <input type="checkbox"/> DP	Amount in Rs.	Amount in Rs.	Amount in Rs.	Amount in Rs.	Amount in Rs.
	2)		<input type="checkbox"/> Growth <input type="checkbox"/> DR <input type="checkbox"/> DP	Amount in Rs.	Amount in Rs.	Amount in Rs.	Amount in Rs.	Amount in Rs.
	3)		<input type="checkbox"/> Growth <input type="checkbox"/> DR <input type="checkbox"/> DP	Amount in Rs.	Amount in Rs.	Amount in Rs.	Amount in Rs.	Amount in Rs.
	4)		<input type="checkbox"/> Growth <input type="checkbox"/> DR <input type="checkbox"/> DP	Amount in Rs.	Amount in Rs.	Amount in Rs.	Amount in Rs.	Amount in Rs.
	5)		<input type="checkbox"/> Growth <input type="checkbox"/> DR <input type="checkbox"/> DP	Amount in Rs.	Amount in Rs.	Amount in Rs.	Amount in Rs.	Amount in Rs.
	6)		<input type="checkbox"/> Growth <input type="checkbox"/> DR <input type="checkbox"/> DP	Amount in Rs.	Amount in Rs.	Amount in Rs.	Amount in Rs.	Amount in Rs.
	7)		<input type="checkbox"/> Growth <input type="checkbox"/> DR <input type="checkbox"/> DP	Amount in Rs.	Amount in Rs.	Amount in Rs.	Amount in Rs.	Amount in Rs.
	8)		<input type="checkbox"/> Growth <input type="checkbox"/> DR <input type="checkbox"/> DP	Amount in Rs.	Amount in Rs.	Amount in Rs.	Amount in Rs.	Amount in Rs.
Total Regular Investment per Goal								
Total Regular Investment in all Goals				(in figures)				

DR-Dividend Reinvestment, DP-Dividend Payout.

Payment Mode

Auto Debit (NACH)  Cheque/ DD  Transfer

Cheque/Draft No. \_\_\_\_\_

Cheque/Draft Dated \_\_\_\_\_

(Please mention Bank Name and Account in the below fields)

Drawn on (Name of Bank and Branch) \_\_\_\_\_

Drawn from Bank-Account Number \_\_\_\_\_

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  ) I / We do not wish to register this bank as additional bank in my/our account details.

**Instructions:**

- Cheque for the investment should be made in favour of "Franklin Templeton Family Solutions"
- For payments by Demand Draft, please attach a certificate from the banker or instruction to bank or passbook/bank statement evidencing the debit for issuance.

**Redemption (Please read Product labeling details available on cover page of the SID & KIM and instructions before filling this Form.)**

Account Number	Goal	Scheme / Plan / Option	Units	Amount in Rs.

Note: You must specify either the Account Number or Goal with Scheme/Plan/Option

Note: To receive the redemption payment in a bank account other than your default bank account (from any one of the banks already registered), please provide the required information mentioned below:

Payout to any one of the existing registered bank accounts:

Bank Name: \_\_\_\_\_ Bank account No: \_\_\_\_\_ (Payment will be made in 1/3 business days)

Payout to new account (Payment will be made after 10 calendar days of cooling period & based on validation). Please tick and use change of Bank Account section to fill new Bank details.

Signatures: Sole/First Holder/Guardian  Second Holder  Third Holder