

## Form for Individual Applicants/ Investors

Franklin Templeton Asset Management (I) Pvt. Ltd. : Indiabulls Finance Center, Tower 2, 12th and 13th Floor, Senapati Bapat Marg, Elphinstone Road (West), Mumbai 400013

Annexure to Common Application Form No.: \_\_\_\_\_ for:

☐ Sole Applicant ☐ Second Applicant ☐ Third Applicant ☐ Guardian

\*The below information is required for all applicant(s), guardian(s). Please tick above box as applicable and submit a separate form(s) for each category

### Details under FATCA / Foreign tax laws

Country of birth \_\_\_\_\_

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

Or

Please indicate all countries in which you are resident for tax purposes and the associated Tax Reference Numbers below.

Country of Tax Residency	Tax Reference Number

### Additional KYC Information

Gross Annual Income Details (please tick) 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-worth as on (date) [D][D][M][M][Y][Y][Y][Y] Rs. \_\_\_\_\_ ( should not be older than 1 year)

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

Please tick, if applicable, ☐ Politically Exposed Person (PEP) ☐ Related to a Politically Exposed Person (PEP)

I declare that the information is to the best of my knowledge and belief, accurate and complete.

I agree to notify Franklin Templeton Mutual Fund/ Franklin Templeton Asset Management (India) Pvt. Ltd. immediately in the event the information in the self-certification changes.

Name of Applicant / Guardian/ POA	
PAN	
Signature	
Date	

### Instructions:

**Country of Tax Residence and Tax ID number:** Tax Regulations require us to collect information about each investor's tax residency. In certain circumstances (including if we do not receive a valid self-certification from you) we may be obliged to share information on your account with relevant tax authorities. If you have any questions about your tax residency, please contact your tax advisor. Should any information provided change in the future, please ensure you advise us of the changes promptly. If you are a US citizen or resident, please include United States in this related field along with your US Tax Identification Number. Foreign Account Tax Compliance provisions (commonly known as FATCA) are contained in the US Hire Act 2010.

**Politically Exposed Persons (PEP):** PEPs are defined as individuals who are or have been entrusted with prominent public functions in a foreign country, e.g., Heads of States or of Governments, senior politicians, senior Government/judicial/ military officers, senior executives of state owned corporations, important political party officials, etc. or senior political figures and their immediate family members and close associates.