

## **USER GUIDE FOR PRIVATE INVESTORS**

Franklin Templeton Online

Welcome to Franklin Templeton Online. In this user guide, you will find useful information on accessing your holdings information. If you require further information or experience difficulties accessing your data, please contact your local Client Services Team.

Franklin Templeton Online Alerts	Alerts appear on the <b>home page</b> after logging into Franklin Templeton Online. It is one of the main tools of communication with investors, so be sure to read it.	Minimum Disclosed Documents (MDD) and new versions of Application Forms, Purchase/Sell/Switch Form, Transfer Form, and Dealing Guide are available on our website: www.franklintempleton.co.uk.
How to access documents	You can access various forms, factsheets & prospectuses by clicking on " <b>Reports and Forms</b> " available from the top navigation bar. 1. Click on the link to the form you would like to open.	Reports and Forms         My Account Details         Contact         Help         Log out
	2. Download or print the document.	
How to view your portfolios and holdings	Once you are logged into your Franklin Templeton Online account, you will be taken to your investment landing page showing: <b>all portfolios</b> registered to you along with their	Total Value of Holdings 18,328.04 EUR
	corresponding value and preferred currency; total value of all your holdings with Franklin Templeton.	Print Valuation 😝 Inactive Holdings 🗆 Related Portfolios 🗆
	<b>Tip 1:</b> You have an option to hide or view zero balance (inactive) holdings by ticking " <b>Inactive Holdings</b> " check box.	Value Preferred Currency
	<b>Tip 2:</b> You can view any portfolios that you have a relationship with by ticking " <b>Related Portfolios</b> " check box.	18,328.04 EUR
How to view your transactions for a specific period	<ol> <li>Select a portfolio.</li> <li>Select a subfund.</li> <li>The transaction overview will be presented with a list of transactions</li> </ol>	Transaction Type Deal Reference Number
		Reinvested Long Term Capital Gain     0123 A123456789       Reinvested Dividends     0123 A123456789
	<ol> <li>To view the details, select "Deal Reference Number" which you will also find on the deal confirmation letter.</li> </ol>	Transactions Distributions
	5. Another option is to use the date and transaction type search criteria and click on " <b>Search</b> ".	Search From Date To Date
Here to view your	Client Details view your client reference symplex client	
How to view your investment details	name, registered primary and correspondence address(es), telephone and fax number(s), email address.	Reports and Forms My Account Details Contact Help Log out
	*Regular Savings Plan – view your portfolio number, portfolio name, selected frequency, subfund name, amount, and currency.	Investments Client Details Relationships
	*Systematic Withdrawal Plan – view your portfolio number, portfolio name, selected frequency, subfund name, amount, and currency.	
	Bank Account Details – view your bank account name, bank account number, IBAN, SWIFT Code, and currency. *Regular Savings Plan and Systematic Withdrawal Plan are not available in every country.	

Select "My Account Details" to view the information How to view your user registration entered during registration on Franklin Templeton Online. details Under "Registration Details" tab, you can view or change your telephone number, email addresses, and preferred language. Your password and security questions can be updated under "Change Password" and "Personal Security Questions" tab. How to navigate To browse through your portfolios, click on the "Portfolio through your Reference". This will display all holdings under the portfolios selected portfolio. Click on the applicable hyperlink to view further details on holdings and individual deals for

Need help? Contact your local Client Service Team by either using the "Contact" section within the Franklin Templeton Online application, or by calling your local Client Service Team directly.

selected portfolios.

FRANKLIN TEMPLETON	
Investments > User Details	
Account Details	Registration Details
Change Password	Personal Security Questions
Portfolio Reference	Portfolio

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