# USER GUIDE FOR PRIVATE INVESTORS

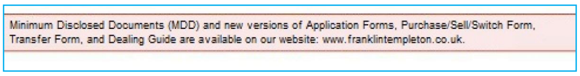
## Franklin Templeton Online

FRANKLIN TEMPLETON

**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

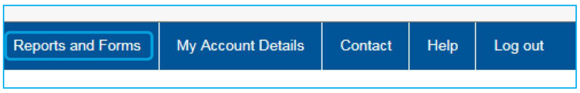
Alerts appear on the **home page** after logging into Franklin Templeton Online. It is one of the main tools of communication with investors, so be sure to read it.




### How to access documents

You can access various forms, factsheets & prospectuses by clicking on "**Reports and Forms**" available from the top navigation bar.

1. Click on the link to the form you would like to open.
2. Download or print the document.

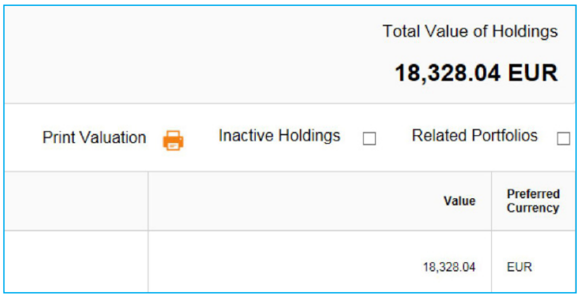



### How to view your portfolios and holdings

Once you are logged into your Franklin Templeton Online account, you will be taken to your investment landing page showing: **all portfolios** registered to you along with their corresponding value and preferred currency; **total value** of all your holdings with Franklin Templeton.

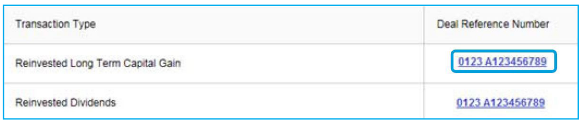
**Tip 1:** You have an option to hide or view zero balance (inactive) holdings by ticking "**Inactive Holdings**" check box.

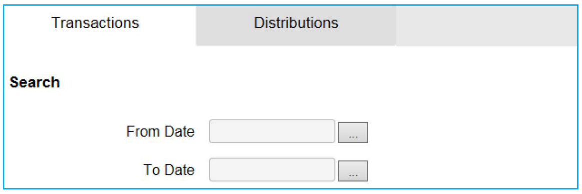
**Tip 2:** You can view any portfolios that you have a relationship with by ticking "**Related Portfolios**" check box.




### How to view your transactions for a specific period

1. Select a portfolio.
2. Select a subfund.
3. The transaction overview will be presented with a list of transactions.
4. To view the details, select "**Deal Reference Number**" which you will also find on the deal confirmation letter.
5. Another option is to use the date and transaction type search criteria and click on "**Search**".




### How to view your investment details

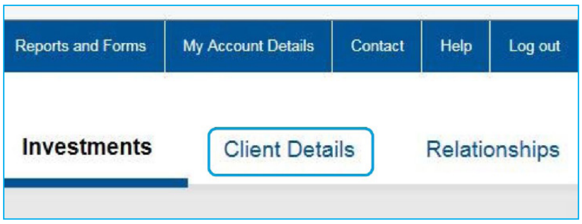
**Client Details** – view your client reference number, client name, registered primary and correspondence address(es), telephone and fax number(s), email address.

***Regular Savings Plan** – view your portfolio number, portfolio name, selected frequency, subfund name, amount, and currency.

***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.

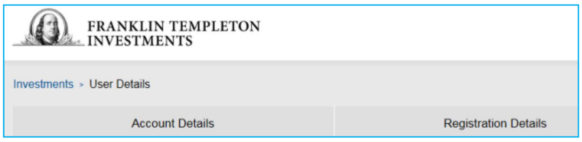
*Regular Savings Plan and Systematic Withdrawal Plan are not available in every country.



## How to view your user registration details

Select "**My Account Details**" to view the information entered during registration on Franklin Templeton Online. Under "**Registration Details**" tab, you can view or change your telephone number, email addresses, and preferred language.

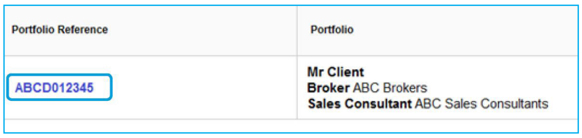
Your password and security questions can be updated under "**Change Password**" and "**Personal Security Questions**" tab.





## How to navigate through your portfolios

To browse through your portfolios, click on the "**Portfolio Reference**". This will display all holdings under the selected portfolio. Click on the applicable hyperlink to view further details on holdings and individual deals for selected portfolios.




## 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.