FRANKLIN TEMPLETON INVESTMENTS

FATCA & CRS
Annexure for Individual Accounts

(Including Sole Proprietor) (Refer to instructions)

(Please consult your professional tax advisor for further guidance on your tax residency, if required)

First / Sole Applicant / Guardian

Name

Gender M F O PAN Occupation Type Service Business Others

Father's Name

Cust ID / Folio No.

Address of tax residence would be taken as available in KRA database. In case of any change please approach KRA & notify the changes

Type of address given at KYC ✓ Residential or Business ✓ Residential ✓ Business ✓ Registered Office

Permissible documents are ○ Passport ○ Election ID Card ○ PAN Card ○ Govt. ID Card ○ Driving License ○ UIDAI Card ○ NREGA Job Card ○ Others

Date of Birth Place of Birth

Country of Birth

Nationality

Are you a tax resident of any country other than India? Yes ✓ No ✓

If yes, please indicate all countries in which you are resident for tax purposes and the associated Tax ID Numbers below.

Country#	Tax Identification Number%	Identification Type *(TIN or Other, please specify)*

#To also include USA, where the individual is a citizen / green card holder of The USA

%In case Tax Identification Number is not available, kindly provide its functional equivalent $

Second applicant

Name

Gender M F O PAN Occupation Type Service Business Others

Father's Name

Cust ID / Folio No.

Address of tax residence would be taken as available in KRA database. In case of any change please approach KRA & notify the changes

Type of address given at KYC ✓ Residential or Business ✓ Residential ✓ Business ✓ Registered Office

Permissible documents are ○ Passport ○ Election ID Card ○ PAN Card ○ Govt. ID Card ○ Driving License ○ UIDAI Card ○ NREGA Job Card ○ Others

Date of Birth Place of Birth

Country of Birth

Nationality

Are you a tax resident of any country other than India? Yes ✓ No ✓

If yes, please indicate all countries in which you are resident for tax purposes and the associated Tax ID Numbers below.

Country#	Tax Identification Number%	Identification Type *(TIN or Other, please specify)*

#To also include USA, where the individual is a citizen / green card holder of The USA

%In case Tax Identification Number is not available, kindly provide its functional equivalent $

Third applicant

Name

Gender M F O PAN Occupation Type Service Business Others

Father's Name

Cust ID / Folio No.

Address of tax residence would be taken as available in KRA database. In case of any change please approach KRA & notify the changes

Type of address given at KYC ✓ Residential or Business ✓ Residential ✓ Business ✓ Registered Office

Permissible documents are ○ Passport ○ Election ID Card ○ PAN Card ○ Govt. ID Card ○ Driving License ○ UIDAI Card ○ NREGA Job Card ○ Others

Date of Birth Place of Birth

Country of Birth

Nationality

Are you a tax resident of any country other than India? Yes ✓ No ✓

If yes, please indicate all countries in which you are resident for tax purposes and the associated Tax ID Numbers below.

Country #	Tax Identification Number %	Identification Type *(TIN or Other, please specify)*

#To also include USA, where the individual is a citizen / green card holder of The USA

%In case Tax Identification Number is not available, kindly provide its functional equivalent $

Certification

I / We have understood the information requirements of this Form (read along with the FATCA & CRS Instructions) and hereby confirm that the information provided by me/us on this Form is true, correct, and complete. I / We also confirm that I / We have read and understood the FATCA & CRS Terms and Conditions below and hereby accept the same.

Signatures

First / Sole Applicant / Guardian **Second Applicant** **Third Applicant**

Date d d m m y y y y Place

FATCA & CRS Terms & Conditions

Details under FATCA & CRS: The Central Board of Direct Taxes has notified Rules 114F to 114H, as part of the Incometax Rules, 1962, which Rules require Indian financial institutions such as the Bank to seek additional personal, tax and beneficial owner information and certain certifications and documentation from all our account holders. In relevant cases, information will have to be reported to tax authorities / appointed agencies. Towards compliance, we may also be required to provide information to any institutions such as withholding agents for the purpose of ensuring appropriate withholding from the account or any proceeds in relation thereto.

Should there be any change in any information provided by you, please ensure you advise us promptly, i.e., within 30 days.

Please note that you may receive more than one request for information if you have multiple relationships with Franklin Templeton Asset Management (India) Pvt. Limited or its group entities. Therefore, it is important that you respond to our request, even if you believe you have already supplied any previously requested information.