



Individual Rights Request Form

If you reside in a location that grants specific rights to your personal information, you may exercise one of these rights by completing this form and emailing it to DataProtectionOfficer@franklintempleton.com. Franklin Templeton will address your request within the applicable legal timeframe.

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REQUESTOR DETAILS (required fields marked with an asterisk)

☐ Mr. ☐ Mrs. ☐ Ms. ☐ Other title _____

*First name _____ *Last name _____ Suffix _____

*Address _____

*City/Town _____ Region _____

*Post/ZIP code _____ *Country _____ Date of birth (mm/dd/yyyy) _____

*Contact number _____ *Email _____

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RELATIONSHIP TO FRANKLIN TEMPLETON

Please select all applicable relationships you have with Franklin Templeton. We may request additional identification according to the details of your request.

☐ Existing Client/Investor ☐ Former Client/Investor

Client Reference Number: _____

☐ Existing Distributor/Broker/Independent Financial Advisor

Broker Number: _____

☐ Former Distributor/Broker/Independent Financial Advisor

Broker Number: _____

☐ Employee/Ex-Employee

☐ Other _____

(Please provide further details on your relationship with Franklin Templeton, for example, prospective client, website visitor, conference attendee, vendor, etc.)

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REQUEST

Please select the relevant box to indicate the purpose of your request and provide further details in the field below.

☐ Right to access

☐ Right to object/opt out of processing

☐ Right to rectification

☐ Right to data portability

☐ Right to deletion ("to be forgotten")

☐ Right to appeal (U.S. only)

☐ Right to restriction of processing

Please provide additional details below to allow completion of your request:

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SIGNATURE

Name of Requestor _____ Date (mm/dd/yyyy) _____

X
Signature of Requestor

Authorized Agents (California only): If you reside in the state of California, you may designate an authorized agent to make this request on your behalf; however, you will still need to verify your identity directly with FT before your request can be processed.

Name of Authorized Agent _____ Date (mm/dd/yyyy) _____

Relationship to Requestor _____ Signature of Authorized Agent _____

Please read this information carefully as it provides guidance on how to complete each section and will allow Franklin Templeton (FT) to respond to your request appropriately.

SECTION 1 – REQUESTOR DETAILS

Provide the required information, marked with an asterisk, to help us identify you and respond to your request appropriately. Please provide an email address and a phone number where we may contact you for further information or clarification regarding your request.

SECTION 2 – RELATIONSHIP TO FRANKLIN TEMPLETON

Please select the type of relationship you currently have with Franklin Templeton or had in the past. If none of the options reflect your interactions with FT, then select 'Other' and enter your own description of why FT would hold your personal information. This information helps FT identify you and route the request to the area of the business most suited to dealing with your request.

- **Current and Former Clients/Investors:** Please provide a 'Client Reference Number' (such as a portfolio reference number, account number, etc.). These fields are not mandatory but are unique references used by FT to identify you and will therefore enable FT to respond to your request more rapidly.
- **Distributors/Brokers/Independent Financial Advisors:** Please provide a 'Broker Number' to help us identify you and locate your information as quickly as possible.

SECTION 3 – REQUEST

Your individual rights may vary based upon where you reside, what personal information FT holds about you, and the purpose for processing that information. We are committed to fulfilling any applicable rights you have according to the relevant laws and regulations governing your location.

Select the type of request you would like to make, summarized below:

- **Right to access** – This right may allow you to confirm whether FT is processing your personal information and may also include the right to obtain a copy of your personal information. FT will fulfil this right according to applicable laws, which generally results in FT providing a template detailing what personal information we hold, and when requested and applicable, sending you a copy of your personal information. Results are sent to you in the same manner we receive your request.
- **Right to rectification** – This right allows you to request that FT update, amend or correct inaccuracies in your personal information. There may be existing processes to request changes, such as address and name changes, that are more appropriate than the Individual Rights Request process. Please include the detail of which personal information elements you wish to update.
- **Right to deletion ("to be forgotten")*** – This right allows you to request that FT delete or anonymize your personal information. FT can only delete or anonymize your personal information if it falls within the bounds of applicable regulations.
**FT will not action this right for anyone who is in an ongoing active client/investor relationship with FT or for a requestor who previously granted consent for marketing activities and has not revoked that consent.*
- **Right to restriction of processing** – This right allows you to request a temporary restriction of processing activities. Please include detail of the processing activity(ies) you wish to restrict and why.
- **Right to object/opt out of data processing** – This right allows you to request that processing activities relating to your personal information be stopped. Please include the detail of which processing activity(ies) you are objecting to. This right may include:
 - the sale or sharing of personal information as defined by the state law applicable to your state residency (U.S.); and
 - profiling in furtherance of solely automated decisions that produce legal or similarly significant effects concerning you.
 - Note: You may also have the right to opt out of direct marketing/targeted advertising. To do so, please visit our website's privacy notice page and click the "Change Your Cookie Settings" button to opt out of tracking cookies.
- **Right to data portability** – You can request that FT electronically transfer your personal information (which you provided to FT) to another company. FT will provide your personal information in a .csv format via secured email or secured postal delivery.
- **Right to appeal (U.S. only)** – You can request that FT review a decision not to fulfil a rights request.

SECTION 4 – SIGNATURE

Please sign and date the request form and return the completed form to FT as noted below.

MAKE A PHOTOCOPY OF THE COMPLETED FORM FOR YOUR RECORDS

EMAIL

DataProtectionOfficer@franklintempleton.com

MAIL

If you reside outside the United States:

Mail your completed form to the closest Franklin Templeton office. A list of offices is available at

<https://www.franklintempleton.com/about-us/contact-us/office-locations>

If you reside in the United States:

Mail your completed form to:

Franklin Templeton
3344 Quality Drive
Rancho Cordova, CA 95670-7313