

**Please return this form:**

- via **post** to your nearest Franklin Templeton office and mark FAO Data Protection Officer or
- via **email** to DataProtectionOfficer@franklintempleton.com.

Franklin Templeton will address your request within the legal timeframes, on receipt of this completed form.

**1 REQUESTOR DETAILS** (Please use black ink and BLOCK CAPITALS. Completing all sections marked with an asterisk is mandatory)

Mr.    Mrs.    Ms.    Other Title \_\_\_\_\_

\*First Name(s) \_\_\_\_\_ \*Last Name(s) \_\_\_\_\_

\*Address \_\_\_\_\_

\*City/Town \_\_\_\_\_ Region \_\_\_\_\_

\*Post Code \_\_\_\_\_ \*Country \_\_\_\_\_ Date of Birth (DD/MM/YYYY) \_\_\_\_\_

\*Contact Number \_\_\_\_\_ Email \_\_\_\_\_

**2 RELATIONSHIP** (Only applicable to individuals)

Please select the type of relationship you have with Franklin Templeton Investments. Multiple selections are possible.

Existing Client      Client Reference Number: \_\_\_\_\_      Portfolio Reference(s): \_\_\_\_\_

Former Client      Client Reference Number: \_\_\_\_\_      Portfolio Reference(s): \_\_\_\_\_

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, e.g. prospect, vendor, etc.)

ID Document Type: \_\_\_\_\_      ID Number: \_\_\_\_\_

(e.g. ID Card, Passport, Driving License)

**3 REQUEST** (Only one rights request per form)

Please check the relevant box to indicate the purpose of your request and **provide further details in the fields below.**

Right to access       Right to object to data processing activities

Right to rectification       Right to restriction of processing

Right to be forgotten       Right to data portability

Please provide further details below to allow Franklin Templeton to complete your request.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**4 SIGNATURE**

\_\_\_\_\_ Name of the Requestor      \_\_\_\_\_ Signature of the Requestor      \_\_\_\_\_ Date (DD/MM/YYYY)

## Introduction

Please read the notes carefully as they provide guidance on how to complete the various sections and will allow Franklin Templeton Investments (FTI) to respond to your Individual Rights Request appropriately.

## Section 1 – Requestor Details

Use the Requestor Details section to provide FTI with the information required to identify you. Please complete this as thoroughly as possible. The fields with an asterisk are mandatory.

Please provide a contact number and, where possible, an email address as FTI may need to contact you for further information or clarification relating to the request.

## Section 2 – Relationship

Use Section 2 (Relationship) to provide detail on the type of relationship you, the requestor has or has held in the past with FTI. This information helps FTI identify you, the requestor and route the request to the area of the business most suited to dealing with your request.

Type of Relationship – the choices here reflect why you expect FTI to hold your personal data. Please read the options carefully and select all the options that best reflect your interaction with FTI. For instance you may be an Ex-Employee and a Former Client if you had previously worked at FTI and invested in an FTI fund.

If none of the tick boxes reflect your interactions with FTI select 'Other' and use the box alongside to enter your own description of why FTI would hold your personal data.

If you are a client or a former client please provide a 'Client Reference Number' or a 'Portfolio Reference'. These fields are not mandatory but are unique references used by FTI to identify an individual and will therefore enable FTI to respond to your request more rapidly.

The 'Broker Number' field should be completed if you know FTI hold this unique identifier.

The 'ID Document Type' and 'ID Number' field are not mandatory but can be used to provide FTI with further information that will help identify you and respond to your request. Please complete both the 'ID Document Type' and the relevant 'ID Number' (e.g. Passport and Passport Number)

## Section 3 - Request

This section is designed to capture the detail of which of your individual rights you would like to invoke using Individual Rights Request form.

**\*You must only select 1 individual right per form.**

The individual rights are summarised below;

*\*Please note that individuals under the regulation are referred to as data subjects.*

- **Right of access** - Data subjects can request the right of access to their data. FTI will provide a template detailing what personal information they hold regarding the data subject.
- **Right to rectification** - Right to rectification allows a data subject to request that FTI amend incorrect personal data regarding them.  
There may be existing processes to request changes such as address and name changes that are more appropriate than the Individual Rights Request process.  
*\*When invoking this right please include the detail of which personal data elements you wish to update.*
- **Right to be forgotten** - The Right to be forgotten allows a data subject to request that FTI remove any personal data that is held regarding the data subject. FTI can only invoke the right to be forgotten if it falls within the bounds of applicable regulations.  
*\*FTI will not action this right for anyone who is in an ongoing active client relationship with the company or for a requestor who has previously granted consent for marketing activities and not revoked that consent.*
- **Right to object to data processing activities** - A data subject can request that processing activities related to their personal data are stopped.  
*\*When invoking this right please include the detail of which processing activity(s) you are objecting to.*
- **Right to restriction of processing** - In certain circumstances a data subject can request a temporary restriction of processing activities.  
*\*When invoking this right please include detail of the processing activity(s) you wish to restrict and why.*
- **Right to Data Portability** - A data subject can request that FTI makes the personal data which was provided to them available for electronic transfer to another in a structured, commonly used and machine-readable format and have the right to transmit those data to another controller. FTI will provide the data via .csv format via secured email or secured postal delivery.