Client Name:


Date:
The Franklin Quotential Portfolio that best fits your needs depends on your risk tolerance, investment time horizon and expected returns. To help you, we’ve developed a comprehensive BESTFIT™ Questionnaire to help your advisor assess your investment goals and recommend which Franklin Quotential Portfolio is right for you. As your financial goals change, you may find it useful to periodically review your questionnaire responses with your advisor to ensure your current needs are being well served by your investment choices.

1. When do you expect to start drawing an income from this investment (i.e., stop saving and start spending)?
   - Immediately ........................... score = 1
   - 1–5 Years ............................... score = 2
   - 5–10 Years ............................... score = 3
   - 10+ Years ............................... score = 4

2. What is your approximate annual household income?
   - Under $50,000 ........................ score = 1
   - $50,001–$100,000 ................. score = 2
   - $100,001–$150,000 ............... score = 3
   - Over $150,000 ....................... score = 4

3. Today, what proportion of your household income should come from savings and investments?
   - 80–100% ................................. score = 1
   - 50–80% ................................. score = 2
   - 25–50% ................................. score = 3
   - 0–25% ................................. score = 4
   - None for the foreseeable future . . . score = 5

4. Assuming normal market conditions, what would you expect from this investment over time?
   - Stability of my investment is crucial ................................ score = 1
   - Stability of my investment is more important than profit ................. score = 2
   - I need stability, but not without a modest profit ........................ score = 3
   - I need a modest profit, but not without stability ........................ score = 4
   - Growth of my investment is more important than stability ............ score = 5

5. How much of a decline in your assets could you tolerate in any given year?
   - I’d have a hard time tolerating any losses ........................ score = 1
   - I can tolerate a small loss ....................................... score = 2
   - I can tolerate a loss .................................................... score = 3
   - I understand a loss of principal is a realistic possibility ........... score = 4

6. If your investments lost money, how long would you be willing to wait to recover?
   - Within 6 Months ........................ score = 1
   - Within 1 Year ............................ score = 2
   - Within 2 Years .......................... score = 3
   - Within 3 Years ............................ score = 4
   - Beyond 3 Years ........................... score = 5

7. Where do you prefer the majority of your investments domiciled?
   - Canadian Markets ............................................. score = 1
   - North American Markets ................................. score = 2
   - Global Markets including Developed Economies ................... score = 3
   - Global Markets including Emerging Economies ................... score = 4

YOUR TOTAL SCORE

YOUR BESTFIT™ IS...

<table>
<thead>
<tr>
<th>Score</th>
<th>Recommended Franklin Quotential Portfolio</th>
</tr>
</thead>
<tbody>
<tr>
<td>7–9</td>
<td>Fixed Income</td>
</tr>
<tr>
<td>10–13</td>
<td>Diversified Income</td>
</tr>
<tr>
<td>14–19</td>
<td>Balanced Income</td>
</tr>
<tr>
<td>20–25</td>
<td>Balanced Growth</td>
</tr>
<tr>
<td>26–28</td>
<td>Growth</td>
</tr>
<tr>
<td>29–31</td>
<td>Diversified Equity</td>
</tr>
</tbody>
</table>
The Franklin Quotential Portfolios

FRANKLIN QUOTENTIAL—PORTFOLIOS FOR EVERY NEED, OBJECTIVE AND LIFE STAGE

Looking For:

<table>
<thead>
<tr>
<th>Conservative</th>
<th>Fixed Income Portfolio</th>
</tr>
</thead>
<tbody>
<tr>
<td>A full fixed income portfolio primarily focused on Canada</td>
<td></td>
</tr>
<tr>
<td>A mixed portfolio designed to deliver regular income</td>
<td>Diversified Income Portfolio</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Moderate</th>
<th>Balanced Income Portfolio</th>
</tr>
</thead>
<tbody>
<tr>
<td>A bias towards Canadian equities and fixed income</td>
<td></td>
</tr>
<tr>
<td>An equity balanced solution</td>
<td>Balanced Growth Portfolio</td>
</tr>
<tr>
<td>Geographically diversified equity with some fixed income representation</td>
<td>Growth Portfolio</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Growth</th>
<th>Diversified Equity Portfolio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Predominantly global equity</td>
<td></td>
</tr>
</tbody>
</table>

Franklin Quotential Portfolios are a targeted multi-asset solution offering diversification across asset classes, investment styles, quality and global markets. Managed in Canada, the investment team includes more than 80 professionals from around the globe who collaborate to: develop long-term capital market expectations; target and capture short-term opportunities with agility; and identify alpha sources and monitor bottom up strategies.

The team’s investment process is guided by robust, risk-centric protocols that are designed to measure, monitor and manage risks at a granular level, ultimately aiming to verify that each and every risk has the potential to contribute to the long-term reward and is an intended and rational part of each portfolio’s strategy.

This unique combination of institutional diversification and investment discipline allows us to offer Canadian investors a strategic and forward-looking solution designed to meet their expected outcomes over the long term.