



**FRANKLIN
TEMPLETON**

BESTFIT™ QUESTIONNAIRE

Franklin Quotential® Portfolios

Client Name:

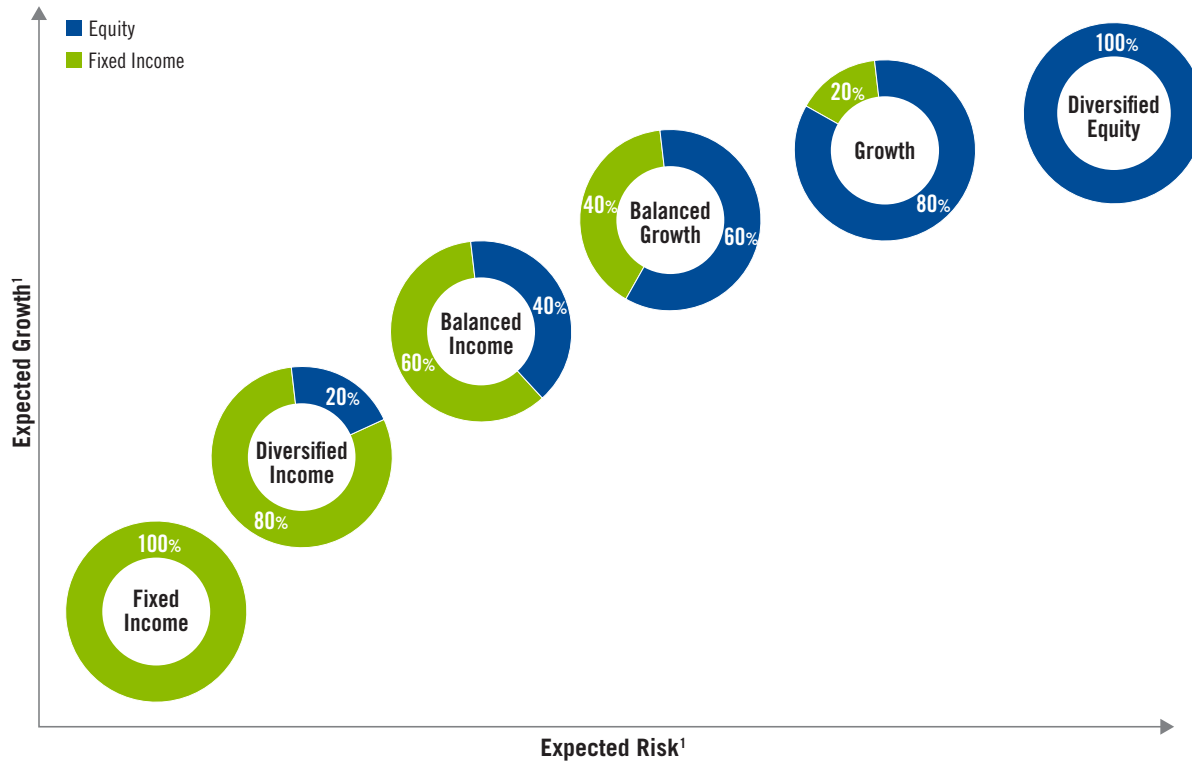
Date:

What's Your Quotential?

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	<input type="text"/>
1–5 years	score = 2	
5–10 years	score = 3	<input type="text"/>
10+ years	score = 4	
2. What is your approximate annual household income?		
Under \$50,000	score = 1	<input type="text"/>
\$50,001–\$100,000	score = 2	
\$100,001–\$150,000	score = 3	<input type="text"/>
Over \$150,000	score = 4	
3. Today, what proportion of your household income should come from savings and investments?		
80–100%	score = 1	<input type="text"/>
50–80%	score = 2	
25–50%	score = 3	<input type="text"/>
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	<input type="text"/>
Within 1 year	score = 2	
Within 2 years	score = 3	<input type="text"/>
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
		<input type="text"/>
YOUR BESTFIT™ IS...	Score	Recommended Franklin Quotential Portfolio
	7–9	Fixed Income
	10–13	Diversified Income
	14–19	Balanced Income
	20–25	Balanced Growth
	26–28	Growth
	29–31	Diversified Equity

The Franklin Quotential Portfolios



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

Looking For:

Conservative	A full fixed income portfolio primarily focused on Canada	Fixed Income Portfolio
	A mixed portfolio designed to deliver regular income	Diversified Income Portfolio
Moderate	A bias towards Canadian equities and fixed income	Balanced Income Portfolio
	An equity balanced solution	Balanced Growth Portfolio
	Geographically diversified equity with some fixed income representation	Growth Portfolio
Growth	Predominantly global equity	Diversified Equity Portfolio

1. Relative to Other Franklin Quotential Portfolios.

A Global Approach. A Canadian Perspective.

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.

This questionnaire is intended as a guide only, and is not to be construed as investment advice. Please consult your investment advisor before investing. Commissions, trailing commissions, management fees and expenses all may be associated with mutual fund investments. Please read the prospectus or fund facts document before investing. The indicated rates of return are historical annual compounded total returns including changes in unit value and reinvestment of all distributions and do not take into account sales, redemption, distribution or optional charges or income taxes payable by any security holder that would have reduced returns. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated. Franklin Templeton Solutions is a world-wide team dedicated to global portfolio-based solutions and draws on the expertise of a number of Franklin Templeton affiliates. In Canada, the advisor to the Canadian FT Solutions mandates is Fiduciary Trust Company of Canada. Franklin Quotential Portfolios and BESTFIT Questionnaire are trademarks of Franklin Templeton Investments Corp.



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