



How to Select Your Advisor

An Investor Education and Awareness Initiative
by Franklin Templeton Mutual Fund



Aspects to Evaluate While Selecting An Advisor

- Seek References
- Advisor's Qualification
- Infrastructure and Value Added Services
- After Sale Support
- Track Record of the Advice



Why Adopt Caution While Selecting An Advisor

- Responsible for Offering You Appropriate Advice
- Be Led by Advice that Keeps You as the Focal Point, Rather than a Product



Points to Remember...



- Choose your investment advisor after proper due diligence
- Do not get swayed by tall claims made by an investment advisor
- AMFI has made the Know Your Distributor certificate mandatory for mutual advisors
- Evaluate the attitude / rationalisation of the advisor
- Check your advisor's qualifications
- Assess the Infrastructure and value added services

Points to Remember...



- Evaluate whether he can provide you with sufficient after sale support
- Ask for a track record of his advice
- Ask your investment advisor questions that are relevant in the context of your risk appetite, investment objectives and time horizon
- Do your own due diligence, do not simply be led by brands or influential individuals for investment advice

Lets Do A Short Quiz!



**We now invite you to test your learning by taking up this simple quiz
(And Win Exciting Prizes!)**



Thank You For Participating!

Disclaimer: The contents of this document are only for informative purposes and are not to be used or considered to be an offer to sell or buy units of **Franklin Templeton Mutual Fund schemes**. This video is for information purposes only, provided on an 'as is' basis. Nothing in it should be construed as personal financial advice. You are responsible for your own investment decisions and you should seek advice concerning suitability from your investment adviser regarding any of the investments mentioned. The video is for personal non-commercial use only and may not be copied, stored, redistributed or broadcast in any way. We recommend you read the complete Terms of Use.

Quick Quiz



- 1) _____ has made Know Your Distributor (KYD) mandatory for mutual fund advisors.
A. SEBI B. AMFI
C. IRDA D. RBI

- 2) One should blindly go with big brands while selecting an advisor
A. True
B. False

- 3) _____ is required from the investment advisor for services like changing bank mandate for your investments, obtaining account statements, submitting redemption requests, a timely review of the portfolio, etc.
A. Infrastructure B. Track record of advice
C. After sale support D. None of the above

Quick Quiz

- 4) How the investment advisor has fared in his advice can be judged by his _____.
- A. Track record of the advice and references
 - B. Infrastructure
 - C. Attitude / Rationalisation
 - D. Advisors qualifications
- 5) It is important to ask your advisor relevant questions to recognise his capability well.
- A. True
 - B. False



Mutual Fund investments are subject to market risks, read all scheme related documents carefully.



FRANKLIN TEMPLETON
INVESTMENTS

Franklin Templeton Asset Management (India) Pvt. Ltd.

Indiabulls Finance Centre, Tower 2,
12th and 13th floor, Senapati Bapat Marg,
Elphinstone (W)

Mumbai 400013

Tel (91-22) 6751 9100

Fax (91-22) 6639 1281

www.franklintempletonindia.com



Caveat (Arial Narrow 10pt.)

© 2014 Franklin Templeton Investments. All rights reserved.

For Internal Use Only / Not for Distribution to the Public

FTI PPT 4:3 01/14