



“You were **BORN** with **WINGS**.
IT’S YOUR TIME TO FLY.”

Presenting



For more than six decades, individuals and institutions around the world have chosen Franklin Templeton as their trusted partner in asset management. Our association with India dates back to over two decades. And since then, you have walked this journey with us. Now, we would like to give you wings, with **UDAAN**. A program only for our trusted IFA partners, **UDAAN** is designed to provide you with the exposure and the skill sets required to adapt to the dynamic market environment and strengthen your position as a trusted financial adviser amongst your clients.

Franklin Templeton's IFA Growth Program

How can UDAAN help you FLY?

Knowledge is key to deliver value to your clients and enhance the opportunity to grow your business. UDAAN offers you a specially curated set of privileges across three categories to help strengthen your wings.

Privileges	Platinum Club	Gold Club	Silver Club
Felicitation / Awards Function	Platinum Convention	Gold Convention	Silver Felicitation
OR	OR	OR	OR
Management / Personal Development Program	Management Development Program (MDP)* - business knowledge courses from a premier management institute in India	Personal Development Program	Personal Development Program
Knowledge Support	Access to FTA – Online & Classroom sessions + Annual Subscription to TIME Magazine / The Economist / Harvard Business Review (Any one magazine)	Access to FTA – Online & Classroom sessions + Annual Subscription to TIME Magazine / The Economist / Harvard Business Review (Any one magazine)	Access to FTA – Online & Classroom sessions + Annual Subscription to TIME Magazine / The Economist / Harvard Business Review (Any one magazine)
Portfolio Manager Interaction	Portfolio Manager Meet / Conference Call / Market Commentary	Portfolio Manager Meet / Conference Call / Market Commentary	Portfolio Manager Meet / Conference Call / Market Commentary
Business Support	Client Presentations + Access to Distributor log-in section and all services offered under “First Serve” + Co-Branded Emailers	Client Presentations + Access to Distributor log-in section and all services offered under “First Serve” + Co-Branded Emailers	Access to Distributor log-in section and all services offered under “First Serve” + Point of Collection – non branch locations

* MDP's are subject to IFA's opting out of the conventions/felicitation

Qualification Criteria

The qualification criteria for the program is based on weighted gross sales & positive weighted net sales, considered from **1st April 2016 to 31st March 2017**, in accordance with the fund categories mentioned below.

Platinum Club	Gold Club	Silver Club
INR 7.00 cr	INR 3.00 cr	INR 1.00 cr

Fund Category

Asset Class	Fund Name
Weightage: 100%	Equity Franklin India Bluechip Fund (FIBCF), Templeton India Growth Fund (TIGF), Franklin India Prima Plus (FIPP), Franklin India Prima Fund (FIPF), Franklin India Flexi Cap Fund (FIFCF), Franklin India High Growth Companies Fund (FIHGCF), Franklin Asian Equity Fund (FAEF), Franklin India Opportunities Fund (FIOF), Franklin Build India Fund (FBIF), Templeton India Equity Income Fund (TIEIF), Franklin India Taxshield (FIT), Franklin India Smaller Companies Fund (FISCF), Franklin Infotech Fund (FIF)
	Hybrid Franklin India Balanced Fund (FIBF), Franklin India Pension Plan (FIPEP)
	Income Franklin India Dynamic Accrual Fund (FIDA), Franklin India Corporate Bond Opportunities Fund (FICBOF), Franklin India Income Opportunities Fund (FIOF), Franklin India Short Term Income Plan (FISTIP), Franklin India Income Builder Account (FIIBA), Franklin India Monthly Income Plan (FIMIP), Franklin India Government Securities Fund (FIGSF) - CP / LT / PF
	Fund of Funds Franklin India Multi - Asset Solution Fund (FIMAS), Franklin India Dynamic PE Ratio Fund of Funds (FIDPEF), Franklin India Life Stage Fund of Funds (FILSF) - 20's Plan, Franklin India Life Stage Fund of Funds (FILSF) - 30's Plan, Franklin India Life Stage Fund of Funds (FILSF) - 40's Plan, Franklin India Life Stage Fund of Funds (FILSF) - 50's Plus Plan, Franklin India Feeder - Franklin U.S. Opportunities Fund (FIF - FUSOF), Franklin India Feeder - Franklin European Growth Fund (FIF - FEGF)
Weightage: 50%*	Income Franklin India Low Duration Fund (FILDF)
	Fund of Funds Franklin India Life Stage Fund of Funds (FILSF) - 50 Plus Floating Rate Plan
	Liquid / Income Franklin India Cash Mangement Account (FICMA), Franklin India Banking & PSU Debt Fund (FIBPDF), Franklin India Saving Plus Fund (FISPF)



*25% Weightage of Daily Average AUM



FRANKLIN TEMPLETON INVESTMENTS

Terms & Conditions

1. Franklin Templeton's loyalty program "UDAAN" herein referred as "Program" is applicable only to IFA's/ Regional Distributors herein referred as "Partners" empanelled with Franklin Templeton Asset Management (India) Pvt Ltd (FTAMIL) and hold valid ARN. FTAMIL reserves the right to choose Partners for this program.
2. **Weighted Gross Sales means the total gross sales arrived after applying weightage given to each scheme. For computing weighted gross sales, fresh purchases, additional purchases and switch-in will be considered. Personal investments of the Partner will not be considered for the Program.**
3. **Weighted Net Sales means the balance arrived by reducing the Weighted Gross Redemption from the Weighted Gross Sales. Weighted Gross Redemption means the total of redemption and switch-out amount arrived after applying weightage given to each scheme.**
4. Switch-in from any scheme will be considered for the calculation of Weighted Gross Sales only if the investment in the source scheme from which the switch out is done has completed the load period applicable to the investment being switched-out.
5. Switches from "Regular Plan" to "Direct Plan" of the same or another fund will be considered as redemption.
6. Transfer out on account of change of broker (ARN) will be considered as redemption for the Partner from whom the assets are getting transferred out. Transfer in on account of change of broker (ARN) will not be considered as gross sales for the partner for whom the assets are getting transferred in.
7. No investments in Direct Plan will be considered in computing gross sales.
8. FTAMIL may consider grouping of multiple ARN's held under same family and treat it as one ARN for the Program. At its sole discretion, FTAMIL will decide on the criteria for grouping of such ARNs.
9. Only one nomination per qualified Partner will be accepted for the program.
10. All tax liabilities arising from receipt of privileges of the program is to be entirely borne by the Partner.
11. The Program shall not be construed as to constitute any type of contract or contractual relationship between the Partner and FTAMIL. The benefits any Partner would derive by being part of the "Program" will purely act as recommendations and should not in any way be construed as binding obligations, default benefits or indication and/or guarantee of benefits in present or future. FTAMIL reserves absolute right to modify/withdraw any or all benefits associated to the Program without any prior notice at its sole discretion.
12. The Partners participating in program shall adhere to Code of Conduct for Distributors and SEBI (Mutual Funds) Regulations, 1996, as amended from time to time.
13. The benefits that accrue to a Partner under this Program is not transferable/non-encashable/cannot be carry forward in any manner.
14. Management Development Program will be offered only in case the Partner opts out of proposed conventions. The list of MDP courses according to eligibility will be announced at end of the Program period.
15. FTAMIL reserves the right to discontinue benefits offered under the Program to any Partner who appear to be using the Program in a manner inconsistent with the terms and conditions or intent of the Program or any portion of the Program.
16. The decision of FTAMIL in all matters pertaining to the Program will be final and binding in all respects on the Partners. In case of any dispute / doubt / issues regarding the Program, the decision of FTAMIL shall be final and binding on the participating Partners.
17. The management of FTAMIL reserves the right to choose the final list of qualifiers at its sole discretion.