

Franklin Templeton — New Business Checklist

In order to do business with Lorence & Vander Zwart and Franklin Templeton:

1. LVZ must have on file a signed Solicitors Agreement.

In addition to the form listed below, your broker dealer may have additional requirements such as requiring account information forms, third party disclosure documents or other requirements.

The following forms need to be completed and returned directly to LVZ to add third party management.

LVZ Investment Management Agreement Form

LVZ Investor Suitability Questionnaire

LVZ Solicitor Disclosure Brochure

Franklin Power of Attorney and Indemnity Agreement

Letter of Instruction to invest shares at NAV— *signed by Rep.*



Did you know:

LVZ can fill out your paperwork for you with your client's consent?

The above forms are available on Laser App and our website?

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