ACTIVELY BUILDING WEALTH SINCE 1954

FRANKLIN TEMPLETON INVESTMENTS

REACH FOR BETTER™

WE ARE COMMITTED TO ONE GOAL

Delivering Exceptional Asset Management Services to You and Your Clients

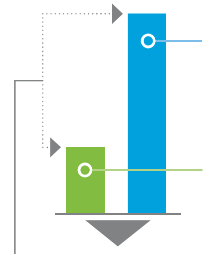
GLOBAL

1947

$927B

CAD in Assets Under Management (AUM)

DID YOU KNOW...



$927 Billion
Franklin Resources, Inc.

$403 Billion
S&P/TSX Composite Index Financials Sector Members[1]

130%

By how much Franklin Resources Inc. is bigger than the average size of the S&P/TSX Composite Financials sector's members

CANADA

1954

$38B

CAD in Assets Under Management (AUM)

WE OFFER INVESTMENT MANAGEMENT EXPERTISE FOR VARIOUS CLIENT SEGMENTS

ADVISORS
PRIVATE WEALTH
INDIVIDUALS
INSTITUTIONS
PENSIONS
CONSULTANTS
FOUNDATIONS AND ENDOWMENTS

IN A STRUCTURE TO MEET YOUR PORTFOLIO NEEDS

- Mutual Funds
- ETFs
- Separately Managed Accounts
- Multi-Asset Portfolios
- Private Pools
- Institutional Pools and Separate Accounts

INVESTMENT EXPERTISE TO BUILD BETTER PORTFOLIOS

A FULL RANGE OF ASSET CLASSES FOR THE OUTCOMES YOU NEED[2]

ACROSS ALL GEOGRAPHIC REGIONS

“Well Done Is Better Than Well Said” – *Benjamin Franklin*

1 ST

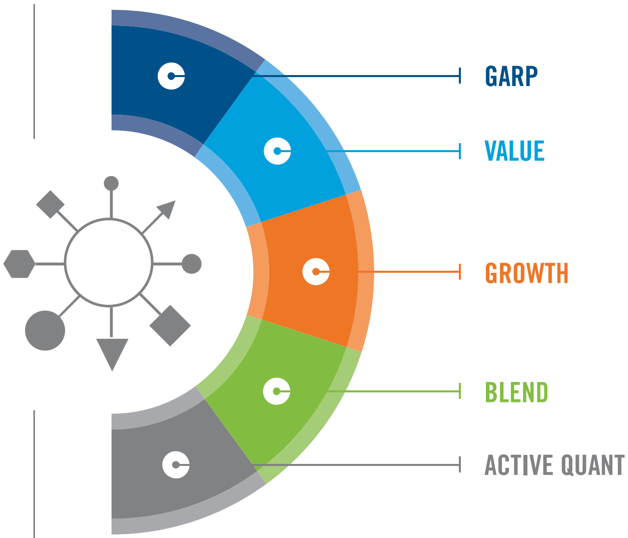
PIONEER IN GLOBAL AND EMERGING MARKET INVESTING[3]

100%

CANADIAN FIXED INCOME FUNDS IN TOP QUARTILES, MULTIPLE TIME PERIODS[4]

95%

FRANKLIN BISSETT BALANCED RATED ASSETS ARE **4 OR 5 STAR** MORNINGSTAR RATED[5]



- Franklin
- Templeton
- Franklin Bissett
- Franklin Mutual Series
- K2 Advisors
- Franklin Templeton Multi-Asset Solutions
- Franklin LibertyShares®

DISTINCT STYLES FOR ADDED DIVERSIFICATION

MANAGED BY INDEPENDENT BOUTIQUE-STYLE MANAGERS

CE CREDITS NOW AVAILABLE ONLINE WITH FRANKLIN TEMPLETON ACADEMY

WEALTH PROFESSIONAL
2018 FINALIST
2017 WINNER
FUND PROVIDER OF THE YEAR

WCM WOMEN IN CAPITAL MARKETS

WOMEN IN CAPITAL MARKETS
MALE LEADER OF THE YEAR
DUANE GREEN (2017)

A PARTNERSHIP YOU CAN RELY ON

GROW YOUR BUSINESS

- **Industry-Leading Simplicity Pricing** program ensures clients benefit from the lowest price available to them.
- Replicate your best clients with our **referral seminar**.
- Craft and articulate an impactful **value proposition**.
- Attract and retain female clients with our **Women and Investing** program.
- Help clients transfer their wealth effectively with **trust and estate services**.

EXPAND YOUR KNOWLEDGE

- Stay informed on markets and portfolio movements with **portfolio manager webcasts and blogs**.
- Keep abreast of the changing investment and regulatory landscape with timely **topic papers and articles**.
- Stay on top of new and evolving products such as ETFs and hedge funds with **educational presentations.**
- Earn CE credits online with **Franklin Templeton Academy.**

SERVICE YOUR CLIENTS

- Provide clients with **timely insights** from our investment experts in Canada and around the world.
- Teach clients valuable lessons on behavioural biases, market volatility and diversification through **client-friendly tools**.
- Online **client communication ideas** for your book of business.
- Use social media effectively in your practice with our **Get Social** program.

IMPROVE YOUR PRACTICE

- Develop professional investor proposals with our **bestbuilt Portfolio Optimization** tool.
- Build better model portfolios by leveraging our **Portfolio Consulting Service**.
- Assess whether you are getting the most out of your time with our **Practice Capacity Workbook**.
- Transition effectively to a **fee-for-service** model with easy-to-use resources.
- Learn about adding **Group Retirement Savings business** to your practice.

How do you deliver exceptional asset management?

As one of the world's largest asset managers, Franklin Templeton Investments brings together multiple world-class investment teams in a single firm for specialized expertise across styles and asset classes. Size certainly helps; but to be exceptional, you need something extra. A determination to constantly achieve more, to improve, outdo, excel. That has been our commitment to our clients for over 70 years, our legacy—and our promise.

Stay connected with us

Industry Associations

1. Source: Bloomberg as of 9/30/2018. Average of the AUM of the 15 S&P/TSX Composite Index Financials Sector Members with AUM data available (15 out of the 27 Total Members).

2. Assets listed exclude Templeton Global Macro Group, High Net Worth and Smart Beta ETFs.

3. Templeton Growth Fund Ltd. launched in 1954 and Templeton Emerging Markets Fund (CDN version) launched in 1991.

4. Source: Morningstar Research Inc., as of **September 30, 2018.** All rights reserved. The information contained herein is proprietary to Morningstar and/or its content providers; may not be copied or distributed; and is not warranted to be accurate, complete or timely. Neither Morningstar nor its content providers are responsible for any damages or losses arising from any use of this information. The Morningstar ranking is subject to change every month. For each of the **1-, 3-, 5-**, and **10-year** performance periods, there were in total **495, 402, 331**, and **150** funds, respectively, in the **Morningstar Canadian Fixed Income category. Franklin Bissett Canadian Government Bond Fund** ranked in the **top** quartile in the **1-year** period (**118th** overall). **Franklin Bissett Core Plus Bond Fund** ranked in the top quartile in the **1-year** period (**39th** overall), **top** quartile in the **3-year** period (**13th** overall), **top** quartile in the **5-year** period (**22nd** overall), and in the **top** quartile in the **10-year** period (**17th** overall). For each of the **1-, 3-, 5-**, and **10-year** performance periods, there were in total **105, 71, 54**, and **7** funds, respectively, in the **Morningstar Canadian Corporate Fixed Income category. Franklin Bissett Corporate Bond Fund** ranked in the **second** quartile in the **1-year** period (**45th** overall), **second** quartile in the **3-year** period (**26th** overall), **second** quartile in the **5-year** period (**14th** overall), and in the **second** quartile in the **10-year** period (**3rd** overall). For each of the **1-, 3-, 5-**, and **10-year** performance periods, there were in total **226, 187, 146**, and **54** funds, respectively, in the **Morningstar Canadian Short Term Fixed Income category. Franklin Bissett Canadian Short Term Bond Fund** ranked in the **second** quartile in the **1-year** period (**81st** overall), **top** quartile in the **3-year** period (**44th** overall), **top** quartile in the **5-year** period (**22nd** overall), and in the **top** quartile in the **10-year** period (**7th** overall). All ranking data refers to Series F units and is subject to change every month.

5. Source: Morningstar Research Inc., as of 9/30/2018. All rights reserved. The Morningstar RatingTM for funds, or "star rating" is calculated for managed products (including mutual funds, variable annuity and variable life subaccounts, exchange-traded funds, closed-end funds, and separate accounts) with at least a three-year history. Exchange-traded funds and open-ended mutual funds are considered a single population for comparative purposes. It is calculated based on a Morningstar Risk-Adjusted Return measure that accounts for variation in a managed product's monthly excess performance, placing more emphasis on downward variations and rewarding consistent performance. The top 10% of products in each product category receive 5 stars, the next 22.5% receive 4 stars, the next 35% receive 3 stars, the next 22.5% receive 2 stars, and the bottom 10% receive 1 star. The Overall Morningstar Rating for a managed product is derived from a weighted average of the performance figures associated with its 3-, 5-, and 10-year (if applicable) Morningstar Ratings metrics. The weights are 100% 3-year rating for 36—59 months of total returns, 60% 5-year rating/40% 3-year rating for 60—119 months of total returns, and 50% 10-year rating/30% 5-year rating/20% 3-year rating for 120 or more months of total returns. While the 10-year overall star rating formula seems to give the most weight to the 10-year period, the most recent 3-year period actually has the greatest impact because it is included in all three rating periods. Morningstar Rating is for the F share class only; other classes may have different performance characteristics. Please refer to www.morningstar.ca for more details on the calculation of Morningstar Risk-Adjusted Ratings and the one-year information.

6. Wealth Professional Award awarded by Wealth Professional publication. The Fund Provider of the Year is the fund company that stands out by providing top-tier investment solutions/products for advisors and investors in Canada. For more details, please go to www.wealthprofessional.ca.

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