



**Section B: Change in scheme preference:**

(Applicable, only if your corporate has given option to the subscriber to select the scheme details. Kindly Contact your Employer for further details)

**(i). PFM Selection for Active and Auto Choice\***

<b><u>PFM Name (in alphabetical order)</u></b>	<b><u>Please tick only one (Select only one PFM)</u></b>
ICICI Prudential Pension Funds Management Company Limited	<input type="checkbox"/>
IDFC Pension Fund Management Company Limited	<input type="checkbox"/>
Kotak Mahindra Pension Fund Limited	<input type="checkbox"/>
Reliance Capital Pension Fund Limited	<input type="checkbox"/>
SBI Pension Funds Private Limited	<input type="checkbox"/>
UTI Retirement Solutions Limited	<input type="checkbox"/>

(Note: Selection of PFM is mandatory both in Active and Auto Choice. In case you do not indicate a choice of PFM, your application form shall be summarily rejected).

**(ii). Investment Option**

Active Choice ☐ Auto Choice ☐

(For details on Auto Choice, please refer to the PFRDA website [www.pfrda.org.in](http://www.pfrda.org.in))

Note:- 1. In case you do not indicate any investment option, your funds will be invested in Auto Choice

2. In case you have opted for Auto Choice, DO NOT fill up section (iii) below relating to Asset Allocation. In case you do, the Asset Allocation instructions will be ignored and investment made as per Auto Choice.

**(iii). Asset Allocation (to be filled up only in case you have selected the 'Active Choice' investment option)**

<b>Asset Class</b>	<b>E (Cannot exceed 50%)</b>	<b>C</b>	<b>G</b>	<b>Total</b>
<b>% share</b>				<b>100%</b>

(Note:-The allocation across E, C and G asset classes must equal 100%. In case, the allocation is left blank and/or does not equal 100%, the application shall be rejected).

**Declaration & Authorization**

I have read the disclaimer and understood that the above Scheme Preference requested through this form will be applicable to existing holdings in the subscriber account as well as to the prospective subscriptions and there may be gain/loss due to change in Net Asset Value (NAV) of the schemes.

**Declaration under the Prevention of Money Laundering Act, 2002 I hereby declare that:**

1. The contribution paid has been derived from legally declared and assessed sources of income.
2. I understand that the PFRDA/NPS Trust has the right to peruse my financial profile and also agree that the PFRDA/NPS Trust has the right to close the NPS account in case I am found guilty of violating the provisions of any Law, directly or indirectly, by any Competent Court of Law, having relation to the laws governing prevention of money laundering in the country.

I \_\_\_\_\_, the applicant, do hereby declare that the information provided above is true to the best of my knowledge & belief.

Date :         (DD/MM/YYYY)

Signature/Thumb  
Impression\* of Subscriber

**To be Filled by POP-SP**

	<div style="border: 1px solid black; width: 300px; height: 30px; margin: 0 auto;"></div>	
	<b>Signature of Authorised Signatory</b>	
	Name : _____ Designation : _____ Department : _____	Place : _____ Date : <div style="display: inline-block; text-align: center;"> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/>            D    D    M    M    Y    Y         </div>
<b>POP/POP-SP Stamp</b>		

**Acknowledgement to Subscriber**

<b>To be Filled by POP-SP</b>		
<b>POP SP Registration Number:</b>	<div style="border: 1px solid black; width: 100px; height: 20px; display: flex; align-items: center;"> <div style="border: 1px solid black; width: 20px; height: 20px; margin-right: 2px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px; margin-right: 2px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px; margin-right: 2px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px; margin-right: 2px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px; margin-right: 2px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px; margin-right: 2px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px; margin-right: 2px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px;"></div> </div>	
<b>PRAN</b>	<div style="border: 1px solid black; width: 200px; height: 20px; display: flex; align-items: center;"> <div style="border: 1px solid black; width: 20px; height: 20px; margin-right: 2px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px; margin-right: 2px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px; margin-right: 2px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px; margin-right: 2px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px; margin-right: 2px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px; margin-right: 2px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px; margin-right: 2px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px; margin-right: 2px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px; margin-right: 2px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px; margin-right: 2px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px; margin-right: 2px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px; margin-right: 2px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px; margin-right: 2px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px; margin-right: 2px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px; margin-right: 2px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px; margin-right: 2px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px; margin-right: 2px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px; margin-right: 2px;"></div> <div style="border: 1px solid black; width: 20px; height: 20px;"></div> </div>	
<b>Subscriber Name :</b>		
<b>Date:    /    /    &amp;    Time:</b>		
<b>Receipt No:</b> (To be provided by POP/POP-SP)		
<b>POP Transaction Charge:</b>  <b>Service Tax :</b>  <b>Total Charge :</b>	<div style="border: 1px solid black; width: 500px; height: 40px; margin-bottom: 5px;"></div> <div style="border: 1px solid black; width: 500px; height: 40px; margin-bottom: 5px;"></div> <div style="border: 1px solid black; width: 500px; height: 40px;"></div>	
	<div style="border: 1px solid black; width: 300px; height: 30px; margin: 0 auto;"></div>	
	<b>Signature of Authorised Signatory</b>	
	Name : _____ Designation : _____	Place : _____
<b>POP/POP-SP Stamp</b>		

**INSTRUCTIONS FOR FILLING THE FORM**

- a) Form to be filled legibly in **BLOCK LETTERS** and in **BLACK INK** only. Please fill the form in legible handwriting so as to avoid errors in your application processing. Please do not overwrite. Corrections should be made by cancelling and re-writing and such corrections should be counter-signed by the applicant.
- b) Please note that PFM can be changed once in a financial year.
- c) Each box, wherever provided, should contain only one character (alphabet/number/punctuation mark) leaving a blank box after each word.
- d) **The subscriber's thumb impression should be verified by the designated officer of the employer accepting the form.**
- e) **Subscribers are advised to retain the acknowledgement slip signed / stamped by the employer where they submit the application.**

Sr. No.	Item No.	Item Details	Guidelines for Filling the Form
<b>Subscriber's Personal Details</b>			
<b>Illustrative list of documents acceptable as proof of identity and address</b>			
<b>No.</b>	<b>Proof of Identity (Copy of any one)</b>		
1	School Leaving Certificate		
2	Matriculation Certificate		
3	Degree of Recognized Educational Institution		
4	Depository Account Statement		
5	Bank Account Statement / Passbook		
6	Credit Card		
7	Water Bill		
8	Ration Card		
9	Property Tax Assessment Order		
10	Passport		
11	Voter's Identity Card		
12	Driving License		
13	PAN Card		
14	Certificate of identity signed by a Member of Parliament or Member of Legislative Assembly or Municipal Councillor or a Gazetted Officer.		

**Subscriber Scheme Preference and/or switch****Active choice**

1. PFM selection is mandatory. The form shall be rejected if a PFM is not opted for.
2. Allocation under Equity (E) cannot exceed 50%
3. A subscriber opting for active choice may select the available asset classes ("E", "G", & "C"). However, the sum of percentage allocation across all the selected asset classes must equal 100. If the sum of percentage allocations is not equal to 100%, or the asset allocation table is left blank, the application shall be rejected.

**Auto choice**

4. A subscriber opting for Auto Choice must also select a PFM. The application shall be rejected if the subscriber does not indicate his/her choice of PFM.
5. In case of Auto Choice, DO NOT fill up section for Asset Allocation. In case you do, the Asset Allocation instructions will be ignored and investment will be made as per Auto Choice.

**In case both the investment option and the asset allocation are left blank, the subscriber's funds will be invested as per Auto Choice**

**GENERAL INFORMATION FOR SUBSCRIBERS**

- a) For any further clarification please refer to the PFRDA website **www.pfrda.org.in** or call on our toll free no. **1800110708**
- b) The Subscriber can obtain the status of his/her application from the CRA website or through the respective employer.
- c) For more information  
Visit us at <http://www.npsra.nsdl.co.in>  
Call us at 022-24994200  
e-mail us at [info.cra@nsdl.co.in](mailto:info.cra@nsdl.co.in)  
Write to: Central Recordkeeping Agency, National Securities Depository Limited, 4th Floor, 'A' Wing, Trade World, Kamala Mills Compound, SenapatiBapatMarg, Lower Parel (W), Mumbai - 400 013.