

Application Form for Corporate Scheme Preference Change

(Please fill all the details in CAPITAL LETTERS & in BLACK INK only. All Fields mark with * are mandatory.)

Corporate Registration Number* :

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Sir/Madam,

We hereby submit a request for Scheme preference change. The necessary details are provided below:

1. Name of the Corporate*:

2. Phone No. *:

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Mobile No.

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STD Code Phone Number

3. Details of Scheme Preference*: Selection of Scheme preference by: Subscriber Corporate

4. If choice of investment is to be made by the Corporate on behalf of the employees (selected as Corporate in clause no. 3) then the following fields are mandatory:

A. PFM Selection* :

***Name of the Pension Funds are given in alphabetical order.**

PFM Name (Please select only one)	Please Tick (√) only one
Birla Sunlife Pension Management Limited	<input type="checkbox"/>
HDFC Pension Management Company Ltd.	<input type="checkbox"/>
ICICI Prudential Pension Funds Management Company Limited	<input type="checkbox"/>
Kotak Mahindra Pension Fund Limited	<input type="checkbox"/>
LIC 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"/>

B. Investment Choice : (In case you do not indicate any investment option, your funds will be invested in Auto Choice.)

Active Choice Auto Choice

Asset Allocation (Please, indicate asset allocation pattern if Active Choice is selected)

Asset Class	E(Cannot exceed 50%)	C	G	Total
% share				100%

We hereby declare and agree that we have read and understood the Offer Document, terms and condition. We further declare that the information supplied in the application, is complete and true. And we will notify Central Recordkeeping Agency (CRA) immediately about any change in the information provided in the application.

Corporate Head Office Seal	<div style="border: 1px solid black; width: 100%; height: 100%;"></div>
	Signature of Authorised Signatory
	Name : _____ Place : _____ Designation : _____ Date : <input type="checkbox"/> <input type="checkbox"/> - <input type="checkbox"/> <input type="checkbox"/> - <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Department : _____ D D M M Y Y

To be Filled by POP

POP Registration No.

POP Seal	<div style="border: 1px solid black; width: 100%; height: 100%;"></div>
	Signature of Authorized Signatory
	Name : _____ Place : _____ Designation : _____ Date : <input type="checkbox"/> <input type="checkbox"/> - <input type="checkbox"/> <input type="checkbox"/> - <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Department : _____ D D M M Y Y

[To be filled by CRA]

Received by: _____

Received at: _____ Date: _____

Acknowledgement Number (by CRA)

Note

1. Corporate has to select one PFM out of the latest list of PFMs who would invest the fund as per selected investment choice.
2. Please, visit PFRDA website: www.pfrda.org.in for latest list of PFMs and their code numbers.
3. Examples of E, C and G mix under 'Active Choice' are as follows:-

E (Equity)	C (Fixed Income)	G (Government Securities)
50% (max)	25%	25%
50% (max)	30%	20%
0%	50%	50%
0%	100%	0%
0%	0%	100%
30%	30%	40%
20%	50%	30%

4. In case the asset allocation amongst "E", "C" & "G" is left blank after choosing a PFM and the "Active Choice" option by the Corporate, it will be deemed that the Corporate intends to provide the option of asset allocation to its Subscribers. The Corporate should accordingly advise its Subscribers to provide the necessary information while filling up the Subscriber Registration Form.