

Application Form for Corporate Scheme Preference Change NSDL e-Governance Infrastructure Limited

(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*:

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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:

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

*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"/>
SBI Pension Funds Private Limited	<input type="checkbox"/>
UTI Retirement Solutions Limited	<input type="checkbox"/>

(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: [Please Tick (✓) in the box given below showing your investment option]

Active Choice Auto Choice

Please note:

1. In case you select Active Choice fill up section (iii) below and if you select Auto Choice fill up section (iv) below.
2. In case you do not indicate any investment option, your fund will be invested in Auto Choice (LC 50).
3. In case you have opted for Auto Choice and fill up section (iii) below relating to Asset Allocation, the Asset Allocation instructions will be ignored and investment will be made as per Auto Choice (LC 50).
4. In case scheme preference is to be selected by Subscriber, then the Corporate should accordingly advise its Subscribers to provide the necessary information while filling up the Subscriber Registration Form.

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

Asset Class	E (Cannot exceed 50%)	C (Max up to 100%)	G (Max up to 100%)	A (Cannot exceed 5%)	Total (100%)	Note: 1.The total allocation across E, C , G and A asset classes must be equal to 100%. In case, the allocation is left blank and/or does not equal 100%, the application shall be rejected. 2.Asset class E-Equity and related instruments; Asset class C-Corporate debt and related instruments; Asset class G-Government Bonds and related instruments; Asset Class A-Alternative Investment Funds including instruments like CMBS, MBS, REITS, AIFs, Invlts etc
Specify %						

(iv). Auto Choice Option (To be filled up only in case you have selected the ‘Auto Choice’ investment option. In case, you do not indicate a choice of LC, your funds will be invested as per LC 50.)

Life Cycle (LC) Funds	Please Tick (√) Only One	Note:1. LC 75- It is the Life cycle fund where the Cap to Equity investments is 75% of the total asset 2. LC 50- It is the Life cycle fund where the Cap to Equity investments is 50% of the total asset 3. LC 25- It is the Life cycle fund where the Cap to Equity investments is 25% of the total asset
LC75		
LC50		
LC25		

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: 150px; height: 30px; margin: 0 auto;"></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"/> <div style="text-align: center; margin-left: 100px;">D D M M Y Y</div>
	Department : _____

To be Filled by POP

POP Registration No.

POP Seal	<div style="border: 1px solid black; width: 150px; height: 30px; margin: 0 auto;"></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"/> <div style="text-align: center; margin-left: 100px;">D D M M Y Y</div>
	Department : _____

[To be filled by CRA]

Received by: _____

Received at: _____ Date: _____

Acknowledgement Number (by CRA)

Note:

- Corporate has to select one PFM out of the latest list of PFMs who would invest the fund as per selected investment choice.
- Examples of 'E', 'C', 'G' & 'A' mix are as follows:-

E (Equity)	C (Fixed Income)	G (Government Securities)	A (Alternative Investment Funds)
50% (max)	25%	20%	5%
50% (max)	20%	25%	5%
0%	50%	50%	0%
0%	100%	0%	0%
0%	0%	100%	0%
30%	25%	40%	5%
20%	50%	30%	0%

Document to be Submitted to POP : Documents as a proof for KYC on the status of corporate/entity.