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

(Please fill all the details in CAPITAL LETTERS & in BL	ACK INK only. All Fields mark with * are mandatory.)			
Corporate Registration Number* :				
Sir/Madam,				
We hereby submit a request for Scheme Preference change. The necessary details	are provided below:			
Name of the Corporate*:				
2. Phone No. *:	Mobile No.			
	Additional and the second and the se			
STD Code Phone Number				
3. Details of Scheme Preference* : Selection of Scheme preference by: Subscr	iber Corporate			
4. If choice of investment is to be made by the Corporate on behalf of the employmandatory:	ees (selected as Corporate in clause no. 3) then the following fields are			
•				
(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				
HDFC Pension Management Company Ltd.				
ICICI Prudential Pension Funds Management Company Limited				
Kotak Mahindra Pension Fund Limited				
LIC Pension Fund Limited				
Reliance Capital Pension Fund Limited				
SBI Pension Funds Private Limited				
UTI Retirement Solutions Limited				
(Selection of PFM is mandatory both in Active and Auto Choice. In case you do r	not indicate a choice of PFM, your application form shall be summarily rejected).			
(ii). Investment Option: [Please Tick ($\sqrt{\ }$) in the box given below	v 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 sele				
	ested in Auto Choice (LC 50). ating to Asset Allocation, the Asset Allocation instructions will be ignored			
	noosing a PFM and the "Active Choice" option by the Corporate, it will be			
deemed that the Corporate intends to provide the option of choosing the a Subscribers to provide the necessary information while filling up the Sub	asset allocation to its Subscribers. The Corporate should accordingly advise its scriber Registration Form			
(iii). Asset Allocation (To be filled up only in case you have selected the 'Active Choice' investment option)				
AMPLIANCE TANGENTIAN (A DE TAIRER UP OMY IN CASE) ON MATE SELECTED THE TREATMENT OPTIONS				
Asset E C G A Total Class (Cannot (Max up (Max up (Cannot	Note: Asset class E-Equity and related instruments; Asset class C-Corporate debt and			
exceed 50%) to 100%) to 100%) exceed 5%)	related instruments: Asset class G-Corporate debt and related instruments:			

100%

MBS, REITS, AIFs, Invlts etc

Specify

%

related instruments; Asset class G-Government Bonds and related instruments;

Asset Class A-Alternative Investment Funds including instruments like CMBS,

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

10.25					
We hereby declare and agree that we have read and undo application, is complete and true. And we will notify C application.	erstood the Offer Document, terms and condition. We further declare that the information supplied in the entral Recordkeeping Agency (CRA) immediately about any change in the information provided in the				
	Signature of Authorised Signatory				
	Name : Place : Designation : Date :				
Corporate Head Office Seal	D D M M Y Y Department:				
To be Filled by POP POP Registration No.					
	Signature of Authorized Signatory				
	Name : Place : Designation : Date : D D M M Y Y				
POP Seal	Department:				
[To be filled by CRA]					
Received by:	<u> </u>				
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. Examples of E, C, G and A mix are as follows:-

E (Equity)	C (Fixed Income)	G (Government Securities)	A(Alternative Investment
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%

3. In case the asset allocation amongst 'E', 'C', 'G' & 'A' 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 choosing the asset allocation to its Subscribers. The Corporate should accordingly advise its Subscribers to provide the necessary information while filling up the Subscriber Registration Form.