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# Request for Activation of Tier-II account under New Pension System (NPS) To be used by Subscribers having a pre-existing Tier I account under NPS

For POP-SP use:		
POP-SP Registration No. :  Receipt No.:		
Entered By : Dat	e: Verified By:	Date:
I hereby submit the following details for activation	of Tier – II account under NPS.	
Permanent Retirement Account Number (PRAN)*	:	
1. Subscriber's Name:(First N	ame) (Middle Name) (Las	t Name)
2. Bank Details (Mandatory):	anie) (Middle Ivanie) (Las	(Name)
Savings A/c Current A/c	(please refer to Sr. No. i of the instruction	ons)
Bank A/c Number*		
Bank Name*		
Bank Branch*		
Bank Address*		
Balik Address		
Pi G Lin	D LANGE CAR	
Pin Code*  IFS code (Wherever applicable)	Bank MICR Code*	
3. Subscriber's Nomination Details (OPTIONAL	- please refer to Sr. No. i of the instructions)	
	<u></u>	
Do you want to retain the same nomination as in y If NO, please fill in the details below.	our Tier I account? YES NO	
Name of the Nominee: 1st Nominee	2nd Nominee	3rd Nominee
Name of the Nominee: 1st Nominee First Name*	2nd Nominee First Name *	3rd Nominee First Name*
1st Nominee		
1st Nominee		
1st Nominee First Name*	First Name *	First Name*  Middle Name
1st Nominee First Name*	First Name *	First Name*
Ist Nominee First Name*  Middle Name	First Name *  Middle Name	First Name*  Middle Name
Ist Nominee  First Name*  Middle Name  Last Name  Date of Birth (In case of a minor)*:	First Name *  Middle Name  Last Name	First Name*  Middle Name  Last Name
Ist Nominee  First Name*  Middle Name  Last Name  Date of Birth (In case of a minor)*:	First Name *  Middle Name	First Name*  Middle Name
Ist Nominee  First Name*  Middle Name  Last Name  Date of Birth (In case of a minor)*:	First Name *  Middle Name  Last Name  2nd Nominee	First Name*  Middle Name  Last Name  3 <sup>rd</sup> Nominee
Ist Nominee  First Name*  Middle Name  Last Name  Date of Birth (In case of a minor)*:  1st Nominee  Relationship with the Nominee:	First Name *  Middle Name  Last Name	First Name*  Middle Name  Last Name
Ist Nominee  First Name*  Middle Name  Last Name  Date of Birth (In case of a minor)*:  1st Nominee  Relationship with the Nominee:  1st Nominee	First Name *  Middle Name  Last Name  2nd Nominee	First Name*  Middle Name  Last Name  3 <sup>rd</sup> Nominee
Ist Nominee  First Name*  Middle Name  Last Name  Date of Birth (In case of a minor)*:  1st Nominee  Relationship with the Nominee:  1st Nominee  Percentage Share:	First Name *  Middle Name  Last Name  2nd Nominee	First Name*  Middle Name  Last Name  3 <sup>rd</sup> Nominee
Ist Nominee  First Name*  Middle Name  Last Name  Last Name  Date of Birth (In case of a minor)*:  1st Nominee  Relationship with the Nominee:  1st Nominee  Percentage Share:  1st Nominee  Some of a minor of a	First Name *  Middle Name  Last Name  2nd Nominee  2nd Nominee  4 2nd Nominee	First Name*  Middle Name  Last Name  3 <sup>rd</sup> Nominee  3 <sup>rd</sup> Nominee  3rd Nominee  3rd Nominee
1st Nominee  First Name*  Middle Name  Last Name  Date of Birth (In case of a minor)*:  1st Nominee  Relationship with the Nominee:  1st Nominee  Percentage Share:  1st Nominee	First Name *  Middle Name  Last Name  2nd Nominee  2nd Nominee	First Name*  Middle Name  Last Name  3 <sup>rd</sup> Nominee  3 <sup>rd</sup> Nominee
Ist Nominee  First Name*  Middle Name  Last Name  Last Name  Date of Birth (In case of a minor)*:  Ist Nominee  Relationship with the Nominee:  Ist Nominee  Percentage Share:  Ist Nominee  Some of a minor of a	First Name *  Middle Name  Last Name  2nd Nominee  2nd Nominee  % 2nd Nominee  % 2nd Nominee  % 2nd Nominee	First Name*  Middle Name  Last Name  3 <sup>rd</sup> Nominee  3rd Nominee  3rd Nominee  3rd Nominee  3rd Nominee
Ist Nominee  First Name*  Middle Name  Last Name  Last Name  Date of Birth (In case of a minor)*:  Ist Nominee  Relationship with the Nominee:  Ist Nominee  Percentage Share:  Ist Nominee  Some of a minor of a	First Name *  Middle Name  Last Name  2nd Nominee  2nd Nominee  % 2nd Nominee  % 2nd Nominee  % 2nd Nominee	First Name*  Middle Name  Last Name  3 <sup>rd</sup> Nominee  3rd Nominee  3rd Nominee  3rd Nominee  3rd Nominee
Ist Nominee  First Name*  Middle Name  Last Name  Last Name  Date of Birth (In case of a minor)*:  Ist Nominee  Relationship with the Nominee:  Ist Nominee  Percentage Share:  Ist Nominee  Sourdian Details (in case of a minor):  Ist Nominee's Guardian Details  First Name*	First Name *  Middle Name  Last Name  2nd Nominee  2nd Nominee  % 3nd Nominee  % 4nd Nominee  % 5nd Nominee  % 6nd Nominee  % 6nd Nominee  % 7nd Nominee  % 8nd Nominee  % 9nd Nominee  % 9nd Nominee	First Name*  Middle Name  Last Name  3 <sup>rd</sup> Nominee  3rd Nominee  3rd Nominee  3rd Nominee  %  3rd Nominee
Ist Nominee  First Name*  Middle Name  Last Name  Last Name  Date of Birth (In case of a minor)*:  Ist Nominee  Relationship with the Nominee:  Ist Nominee  Percentage Share:  Ist Nominee  Standard Details (in case of a minor):  Ist Nominee's Guardian Details  First Name*	First Name *  Middle Name  Last Name  2nd Nominee  2nd Nominee  % 3nd Nominee  % 4nd Nominee  % 5nd Nominee  % 6nd Nominee  % 6nd Nominee  % 7nd Nominee  % 8nd Nominee  % 9nd Nominee  % 9nd Nominee	First Name*  Middle Name  Last Name  3 <sup>rd</sup> Nominee  3rd Nominee  3rd Nominee  3rd Nominee  %  3rd Nominee

. Subscriber So						
	cheme Preference (Please r				r furthe	r details):
	on for Active and Auto Cho	oice (Select o	only one PFM			
FM Name (in alphabetical order)		Please tick	only one			
	Management Company Lim					
ICICI Prudential Pension Funds Management Company Limited						
	a Pension Fund Limited					
LIC Pension Fund Limited						
Reliance Capital Pension Fund Limited						
SBI Pension Funds Private Limited						
UTI Retirement Solutions Limited						
election of PFM is jected).	mandatory both in Active and A	uto Choice. In c	ase you do not i	ndicate a choice	of PFM,	your application form shall be summari
i). Investment (	Option					
ctive Choice	Auto Choice	(For	details on Au	to Choice, pl	ease refe	er to the Offer Document)
ote:-				τ, τ		····,
• In case y Asset Al	llocation instructions will be	oice, DO NOT ignored and i	fill up section fill investment m	on (iii) below ade as per Au	relating ito Choic	to Asset Allocation. In case you d ce.
i). Asset Alloca	ation (to be filled up only in	n case you ha	ive selected t	he 'Active C	<u>hoice' in</u> ¬	<u>vestment option)</u>
Asset Class	E (Cannot exceed 50%)	С	G	Total		
% share				100%		
ote:-				10070	_	
• The allo 100%, the Declaration & mereby declare a me, and the an unsound mind	Authorization and agree that (a) I have rea swers entered in the applica	ed by the POI d and underst tion are mine.	P. tood the Offe	f. In case, the r Document, itizen of Indi	terms & a. (c) I h	on is left blank and/or does not eq conditions or the same was inter ave not been found or declared to solvent. (e) I hold a valid Tier I ad
• The allo 100%, the Declaration & hereby declare and the annusound mind ander NPS.	Authorization and agree that (a) I have reaswers entered in the application under any law for the time	ed by the POI d and underst tion are mine being in force	P. Tood the Offe . (b) I am a Ce. (d) I am no	o. In case, the r Document, itizen of Indi et an undisch	terms & a. (c) I h arged ins	conditions or the same was interpayed not been found or declared to solvent. (e) I hold a valid Tier I as
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To be filled by POP-SP					
	Signature of Authorized Signatory				
	Name :	Place :			
POP-SP Seal	Designation :	Date :			

### INSTRUCTIONS FOR FILLING THE FORM

- The form is to be filled by the Subscribers having a PRAN card and Tier 1 account under NPS. 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 b) 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.
- Each box, wherever provided, should contain only one character (alphabet/number/punctuation mark) leaving a blank box after each word. The details marked with (\*) are mandatory.
- The Subscriber shall provide copy of PRAN card alongwith the application form.
- Applications incomplete in any respect and/or not accompanied by required documents are liable to be rejected. The application is liable to be rejected if mandatory fields are left blank.
- Government employees (mandatorily covered under NPS) may submit their application to any POP-SP of their choice. The list of POP-SPs rendering services under NPS is available on CRA website http://www.npscra.nsdl.co.in
- Any Indian citizen (other than government employee mandatorily covered under NPS) may submit the application only to the POP-SP through which they have registered with CRA for Tier 1 account.
- h) Subscribers are advised to retain the acknowledgement slip signed/ stamped by the POP-SP where they submit the application.
- i) **Bank Details:** 
  - Bank details are mandatory for Tier-II else, account will not be activated. Even if the bank details are same as in Tier II a.
  - b. Subscriber shall provide cancelled cheque, the details of which should match with the details provided under Point No.2 on Page 1. . Even if the bank details are same as in Tier II, the subscriber should provide a 'cancelled cheque'.

# **Subscriber's Nomination Details**

Percentage Share	1) Subscriber can nominate a maximum of three nominees. 2) Subscriber cannot fill the same nominee details more than once. 3) Percentage share value for all the nominees must be integer. Decimals/Fractional values shall not be accepted in the nomination(s). 4) Sum of percentage share across all the nominees must be equal to 100. If sum of percentage is not equal to 100, entire nomination will be rejected.	
Nominee's Guardian Details	If a nominee is a minor, then nominee's guardian details shall be mandatory.	
The nomination exercised for Tier I shall not be automatically applicable to Tier II. A subscriber to Tier II is required to make a fresh nomination.		

In case, you want to retain the same nomination as in Tier I, please select "YES" by putting tick mark in the box.

### **Subscriber Scheme Preference**

# Active choice

- PFM selection is mandatory. The form shall be rejected if a PFM is not opted for.
- Allocation under Equity (E) cannot exceed 50%
- 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 at Point No. 4 (iii) is left blank, the application shall be rejected.

#### Auto choice

- 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
- In case both investment option and the asset allocation at Point No. 4 (ii) and Point No. 4 (iii) are left blank, the subscriber's funds will be invested as per Auto Choice

For more details on investment options and asset classes, please refer to the Offer Document.

### GENERAL INFORMATION FOR SUBSCRIBERS

- The Subscriber can obtain the status of his/her application from the CRA website or through the respective POP-SP.
- For more information

Visit us at http://www.npscra.nsdl.co.in

Call us at 022-24994200

e-mail us at info.cra@nsdl.co.in

Write to: Central Recordkeeping Agency, NSDL e-Governance Infrastructure Limited, 1st Floor, Times Tower, Kamala Mills Compound, Senapati Bapat Marg, Lower Parel (W), Mumbai - 400 013.