

CRA generated Acknowledgement Number (to be filled by Nodal Office):
_____I, _____ the applicant, do hereby declare that
Information stated above is true to the best of my information & belief.

Date :

D	D	M	M	Y	Y	Y	Y

Signature/ Thumb
Impression of the SubscriberScheme Preference Change: Tier II Investment Option: Active Choice Auto Choice Selection of Pension Fund is mandatory both in Active and Auto Choice. In case you select Active Choice fill up **Section (I) below** and if you select Auto Choice fill up **Section (II) on page 3**.I. Active Choice :

PFM Name (*Name of the Pension Funds are given in an alphabetical order)	Please Tick (√)	Asset Class (Specify %)		
		Total allocation across E, C and G asset classes must be equal to 100%		
		E (Max upto 100%)	C (Max upto 100%)	G (Max upto 100%)
Aditya Birla Sunlife Pension Management Limited	<input type="checkbox"/>			
Axis Pension Fund Management Limited	<input type="checkbox"/>			
HDFC Pension Management Company Limited	<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"/>			
Max Life Pension Fund Management Limited	<input type="checkbox"/>			
SBI Pension Funds Private Limited	<input type="checkbox"/>			
TATA Pension Management Limited	<input type="checkbox"/>			
UTI Retirement Solutions Limited	<input type="checkbox"/>			

Please note:

- Asset Class E- Equity and related instruments; Asset Class C- Corporate debt and related instruments; Asset Class G- Government Bonds and related instruments.
- Subscriber can select different PFM for different asset class. For example:
 - Subscriber can select PFM 'X' for asset class E, PFM 'Y' for asset class C and PFM 'Z' for asset class G. (Refer illustration (i) below)
 - Subscriber can select PFM 'X' for asset class E & C and PFM 'Y' for asset class G. (Refer illustration (ii) below)

Illustration (i)

PFM Name	Asset Class (%)		
	<u>E</u>	<u>C</u>	<u>G</u>
PFM 'X'	50		
PFM 'Y'		30	
PFM 'Z'			20

Illustration (ii)

PFM Name	Asset Class (%)		
	<u>E</u>	<u>C</u>	<u>G</u>
PFM 'X'	50	30	
PFM 'Y'			20
PFM 'Z'			

II. Auto Choice:

PFM Name (Please select only one) <i>(*Name of the Pension Funds are given in an alphabetical order)</i>	Please Tick (√) only one
Aditya Birla Sunlife Pension Management Limited	<input type="checkbox"/>
Axis Pension Fund Management Limited	<input type="checkbox"/>
HDFC Pension Management Company Limited	<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"/>
Max Life Pension Fund Management Limited	<input type="checkbox"/>
SBI Pension Funds Private Limited	<input type="checkbox"/>
TATA Pension Management Limited	<input type="checkbox"/>
UTI Retirement Solutions Limited	<input type="checkbox"/>

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
Aggressive (LC 75)	<input type="checkbox"/>	
Moderate (LC 50)	<input type="checkbox"/>	
Conservative (LC 25)	<input type="checkbox"/>	

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I _____, the applicant, do hereby declare that Information stated above is true to the best of my information & belief.		Signature/ Thumb Impression of the Subscriber															
Date : <table border="1" style="display: inline-table; text-align: center;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> <tr> <td>D</td> <td>D</td> <td>M</td> <td>M</td> <td>Y</td> <td>Y</td> <td>Y</td> <td>Y</td> </tr> </table>										D	D	M	M	Y	Y	Y	Y
D	D	M	M	Y	Y	Y	Y										

TO BE FILLED/ATTESTED BY DDO/ POP-SP (Mandatory if the request is processed by the associated Nodal Office) Rubber Stamp of the DDO/ POP-SP	
	Signature of the DDO/ POP-SP Name : _____ Designation: _____

TO BE FILLED/ATTESTED BY NODAL OFFICE Rubber Stamp of the Nodal Office	
	Signature of the Nodal Office (PAO/DTO/DTA/POP) Name : _____ Designation: _____

Acknowledgement to the Subscriber

(To be filled by Nodal Office)

Scheme Preference Change:

Tier I

Tier II

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Nodal Office Registration Number: _____

PRAN:

Name of the Subscriber: _____

Date: ____/____/____ Time Stamp: _____

Receipt Number

(Mandatory for POP/POP-SP)

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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1. POP Transaction Charges:

Rs.

2. Tax as applicable:

Rs.

3. Total Charges:

Rs.

Signature/Stamp of Nodal Office/Place

Instructions for filling the Form

- The Government Subscribers shall use this form for Scheme Preference Change for Tier I and Tier II account.
- Nodal Office# refers to PAO/DTO/DTA or a POP/POP-SP.
- All fields mark with (*) are mandatory. All Dates should be in DDMMYYYY Format.
- For Tier I, the Subscribers shall submit the application to associated Nodal Office only.
- For Tier II, the Subscribers shall submit the application to associated Nodal Office or Point of Presence (PoP). List of PoPs is available on CRA website www.npscra.nsdl.co.in.
- For more information on scheme preference, Active Choice/ Auto Choice, please refer scheme information available on Protean CRA website www.npscra.nsdl.co.in or PFRDA website www.pfrda.org.in.