

**Request for Scheme preference change for Tier II**

(Please fill all the details in CAPITAL LETTERS & in BLACK INK only.)

**For Nodal Office<sup>#</sup> use:** Nodal Office Registration No. : \_\_\_\_\_

Receipt No.: 

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 Receipt Date: \_\_/\_\_/\_\_\_\_  
*(Mandatory for POP/POP-SP)*

PRAN \*: 

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 Name of the Subscriber \*: \_\_\_\_\_

**(i). Pension Fund (PF) Selection (Select only one PF):** Selection of PFM is mandatory both in Active and Auto Choice. In case, if you do not indicate a choice of PF, please note that it is deemed that you have consented to opting for the default option for the PF as prescribed by PFRDA. Currently, SBI Pension Funds Private Limited is the default PFM.

PFM Name (in alphabetical order)	Please tick only one
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"/>
Reliance Capital Pension Fund Limited	<input type="checkbox"/>
SBI Pension Funds Private Limited	<input type="checkbox"/>
UTI Retirement Solutions Limited	<input type="checkbox"/>

**(ii). Investment Option**      Active Choice       Auto Choice

**(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	G	Total
% share				100%

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 : 

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D D M M Y Y Y Y

Signature/ Thumb Impression of the Subscriber

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

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

Acknowledgement to the Subscriber

(To be filled by Nodal Office)

Scheme Preference change :

Nodal office Registration Number: \_\_\_\_\_

PRAN:

Name of the Subscriber: \_\_\_\_\_

Date: \_\_/\_\_/\_\_\_\_

Time Stamp: \_\_\_\_\_

Receipt Number  
(Mandatory for POP/POP-SP)

1. POP Transaction Charges:  Rs.

2. Service Tax (as applicable):  Rs.

3. Total Charges:  Rs.

Signature/Stamp of Nodal Office/Place

Instruction for filling the Form:

- The Subscribers shall use this form only for Tier II account Scheme preference change.
- Nodal Office<sup>#</sup> refers to PAO/DTO/DTA/POP/POP-SP.
- All fields mark with (\*) are mandatory. All Dates should be in DDMMYYYY Format.
- The Subscribers shall submit the application to associated Nodal Office or any POP.
- For more details on terms and conditions of switch, please refer to the Offer Document.

Subscriber Scheme Preference

Selection of PFM is mandatory both in Active and Auto Choice. In case, if you do not indicate a choice of PF, please note that it is deemed that you have consented to opting for the default option for the PF as prescribed by PFRDA. Currently, SBI Pension Funds Private Limited is the default PFM.

Active choice

1. PFM selection is mandatory.
2. Allocation under Equity (E) cannot exceed 50%
3. 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 is left blank, the application shall be rejected.

Auto choice

4. A subscriber opting for Auto Choice must also select a PFM.
5. In case of Auto Choice, DO NOT fill up section for Asset Allocation. In case you do, the Asset Allocation instructions will be ignored and investment will be made as per Auto Choice.

**In case both the investment option and the asset allocation are left blank, the subscriber’s funds will be invested as per Auto Choice**