

**Request for Scheme Preference Change for Tier II
NSDL e-Governance Infrastructure Limited**

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

For Nodal Office[#] 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 you do not indicate a choice of PFM, your application form shall be summarily rejected.

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

Active Choice Auto Choice

Please note:

- In case you select Active Choice fill up section (iii) below and if you select Auto Choice fill up section (iv) below.
- In case you do not indicate any investment option, your funds will be invested in Auto Choice (LC 50)
- 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).

(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%) | Total | Note : 1. The total allocation across E, C and G 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. |
|-------------|--------------------------|-----------------------|-----------------------|-------|---|
| Specify % | | | | 100% | |

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 | <input type="checkbox"/> | |
| LC50 | <input type="checkbox"/> | |
| LC25 | <input type="checkbox"/> | |

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 Subscriber |
|--|

TO BE FILLED/ATTESTED BY DDO (Mandatory if the request is processed by the associated Nodal Office)

Rubber Stamp of the DDO

Signature of the DDO
Name : _____ Designation: _____

TO BE FILLED/ATTESTED BY NODAL OFFICE

Rubber Stamp of the Nodal Office

Signature of the Nodal Office (PAO/DTO/DTA/POP/POP-SP)
Name : _____ Designation: _____

Acknowledgement to the Subscriber

(To be filled by Nodal Office)

Scheme Preference Change:

Nodal Office Registration Number: _____

PRAN:

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Name of the Subscriber: _____

Date: __/__/____ Time Stamp: _____

Receipt Number
(Mandatory for POP/POP-SP)

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1. POP Transaction Charges:

Rs.

2. Tax as applicable:

Rs.

3. Total Charges:

Rs.

| |
|---------------------------------------|
| Signature/Stamp of Nodal Office/Place |
|---------------------------------------|

Instruction for filling the Form:

- The Government Subscribers shall use this form only for Tier II account Scheme Preference Change.
- Nodal Office[#] 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 switch of scheme, you may visit CRA website (www.npscra.nsdl.co.in).

Subscriber Scheme Preference

Active choice

1. PFM selection is mandatory. The form shall be rejected if a PFM is not opted for.
2. Allocation under Equity (E) cannot exceed 50%
3. A Subscriber opting for active choice may select the available asset classes ("E", "C", & "G"). 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. The application shall be rejected if the Subscriber does not indicate his/her choice of 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