

7. SELECTION OF PENSION FUND (PF) AND INVESTMENT CHOICE* (Refer Sr no. 5 of the instructions)

- All Citizen : Selection of one PF is mandatory else form will be rejected. If no investment choice is selected, funds will be invested in Auto Choice (LC 50).
- Corporate Model : The PF / Investment Choice may be exercised in consultation with your Employer.

Pension Fund* (Please Tick (√) one)	Investment Choice (Please Tick (√) one)										
<input type="checkbox"/> Aditya Birla Sunlife Pension Mgmt Ltd <input type="checkbox"/> Axis Pension Fund Management Limited <input type="checkbox"/> DSP Pension Fund Managers Private Ltd <input type="checkbox"/> HDFC Pension Fund Mgmt Ltd <input type="checkbox"/> ICICI Prudential Pension Funds Mgmt Co Ltd <input type="checkbox"/> Kotak Mahindra Pension Fund Ltd <input type="checkbox"/> LIC Pension Fund Limited <input type="checkbox"/> Max Life Pension Fund Mgmt Ltd <input type="checkbox"/> SBI Pension Funds Private Limited <input type="checkbox"/> TATA Pension Management Private Limited <input type="checkbox"/> UTI Pension Fund Limited	<input type="checkbox"/> Balanced Life Cycle Fund (BLC) OR <input type="checkbox"/> Active Choice mention the % share in applicable asset class below <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <th>E (upto 75%)</th> <th>C (Upto 100%)</th> <th>G (Upto 100%)</th> <th>A (Upto 5%)</th> <th>Total</th> </tr> <tr> <td>% Equity</td> <td>% Corp Bonds</td> <td>% Govt. Sec.</td> <td>% Alt. Assets</td> <td>100%</td> </tr> </table> OR <input type="checkbox"/> Auto Choice Select one life cycle fund below Conservative (LC25) <input type="checkbox"/> Moderate (LC50) <input type="checkbox"/> Aggressive (LC75) <input type="checkbox"/>	E (upto 75%)	C (Upto 100%)	G (Upto 100%)	A (Upto 5%)	Total	% Equity	% Corp Bonds	% Govt. Sec.	% Alt. Assets	100%
E (upto 75%)	C (Upto 100%)	G (Upto 100%)	A (Upto 5%)	Total							
% Equity	% Corp Bonds	% Govt. Sec.	% Alt. Assets	100%							

8. Repatriation of corpus* *For repatriation of corpus, the contributions should be made from NRE account only*

I would like to open account on Repatriation Basis Non-repatriation Basis

9. FATCA* (Foreign Account Tax Compliance Act) & CRS DECLARATION (Refer Sr no. 6 of the instructions):

I am a tax resident of India and not resident of any other country I am a tax resident of the country/ies mentioned below
 US Person Yes No.

Particulars	Country (1)	Country (2)	Country (3)
Country/countries of Tax Residency			
Address in the jurisdiction for Tax Residence	Address Line 1		
	City/Town/Village		
	State		
	ZIP/Post Code		
Tax Identification Number (TIN)/Functional equivalent Number			
TIN/ Functional equivalent Number Issuing Country			
Validity of documentary evidence provided (Wherever applicable)	ddmmyyyy	ddmmyyyy	ddmmyyyy

I have understood the information requirement of the Form (read along with the FATCA / CRS Instructions and Terms & Conditions) and hereby confirm that the information provided by me/us on this Form is true, correct and complete and hereby accept the same.

Signature / Thumb Impression* of Applicant
(refer instructions)

10. DECLARATION BY APPLICANT* (Refer Sr no. 7 of the instructions)

I have read and understood the terms and condition sof the National Pension System. The information and documents furnished by me are true and correct, to the best of my knowledge. Any changes in the information furnished by me shall be informed to CRA / NPS Trust. I do not hold any pre-existing account under NPS. I understand that I shall be fully liable for submission of any false or incorrect information or documents.

Declaration under the Prevention of Money Laundering Act, 2002

I here by declare that the contribution paid by me/on my behalf has been derived from legally declared and assessed sources of income. I understand that NPS Trust has the right to peruse my financial profile or share the information, with other government authorities. I further agree that NPS Trust has the right to close my PRAN in case I am found violating the provisions of any law relating to prevention of money laundering.

Date: Place:

Signature / Thumb Impression* of Applicant
(*LTI in case of males and RTI in case of females to be provided. Toe impression in case no hands)

11. DECLARATION BY EMPLOYER (All Details are Mandatory)

Date of Retirement	<input type="text" value="d"/> <input type="text" value="d"/> <input type="text" value="m"/> <input type="text" value="m"/> <input type="text" value="y"/> <input type="text" value="y"/> <input type="text" value="y"/> <input type="text" value="y"/>	
Employee Code/ID	<input type="text"/>	Non-mandatory if not available
CHO Registration Number	<input type="text"/>	CBO Registration Number <input type="text"/>

It is certified that _____ is employed with us and the details provided in this subscriber registration form including the address and employment details provided above are as per the service record of the employee maintained with us. It is further certified that he/she has read entries/entries have been read over to him/herby her by us and got confirmed by him/her.

Name of the Authorised Person	<input type="text"/>		
Designation	<input type="text"/>		
Date	<input type="text" value="d"/> <input type="text" value="d"/> <input type="text" value="m"/> <input type="text" value="m"/> <input type="text" value="y"/> <input type="text" value="y"/> <input type="text" value="y"/> <input type="text" value="y"/>		
Place	<input type="text"/>		

Signature of Authorised person Rubber stamp of the Employer

12. TO BE FILLED BY POP

Receipt No. (17 digits)	<input type="text"/>
POP Registration Number	<input type="text"/> POP-SP Registration Number <input type="text"/>

Documents Received:

Existing Customer: I/we hereby certify/confirm that Shri/Smt/Kum is an existing KYC verified customer. The above applicant is having an operative Bank/ Demat/ Folio/ account (specify nature of the account) having account number /client ID..... maintained at branch/office. The KYC documents available with us for this customer/client matches the requirement for opening NPS account and are in compliance with PML Rules. I/We further confirm that the Bank a/c of Sh/Smt/Kum is a NRE/FCNR/NRO Account (applicable in case of Bank PoP)

Name of the Authorised Person	<input type="text"/>		
Designation	<input type="text"/>		
Date	<input type="text" value="d"/> <input type="text" value="d"/> <input type="text" value="m"/> <input type="text" value="m"/> <input type="text" value="y"/> <input type="text" value="y"/> <input type="text" value="y"/> <input type="text" value="y"/>		
Place	<input type="text"/>		

Signature of Authorised person Rubber stamp of the Pop

ACKNOWLEDGEMENT

Name of the Subscriber	<input type="text"/>	
Application Receipt Date:	<input type="text" value="d"/> <input type="text" value="d"/> <input type="text" value="m"/> <input type="text" value="m"/> <input type="text" value="y"/> <input type="text" value="y"/> <input type="text" value="y"/> <input type="text" value="y"/>	
Initial contribution amount	<input type="text"/>	
Mode of payment	<input type="checkbox"/> Cheque / DD <input type="checkbox"/> Debit Instruction <input type="checkbox"/> Cash	

Stamp and Signature of PoP

INSTRUCTIONS FOR FILLING THE SUBSCRIBER REGISTRATION FORM

General guidelines

- (a) Please fill in legible handwriting to avoid errors. Do not overwrite. Corrections should be countersigned by the applicant. Applications incomplete in any aspect (or) if mandatory fields are left blank (or) with unclear photograph (or) not accompanied by required documents (or) not authenticated by PoP/PoP-SP are liable to be rejected.
- (b) Copies of documents submitted by the applicant should be self-attested.
- (c) Applicant is advised to retain the acknowledgement slip signed / stamped by the PoP/PoP-SP office.

SI	Item No	Item Details	Instructions									
1	1	Eligibility / Applicability	(a) This Form is applicable only for Non Resident Indians (NRIs) & Overseas Citizen of India (OCIs). Foreign Nationals and Persons of Indian Origin (PIO) are not allowed to open NPS account. When an OCI comes to India with an intention to stay for an indefinite period and stays more than 182 days, he/she loses the privileges available to NRIs/OCIs and thus such OCI may open an NPS account applicable to resident Indians. (b) NRIs/OCIs are not permitted to open NPS Tier-II account									
		Option for PRAN Card and kit	In case a subscriber opts not to have a physical PRAN Card or Welcome Kit, reduced account opening charges of CRA are applicable as under: <table border="1"> <thead> <tr> <th colspan="3">Account opening with ePRAN card (in Rs.)</th> </tr> <tr> <th>Account opening with Physical PRAN card in (Rs.)</th> <th>Welcome kit in hardcopy</th> <th>eWelcome kit (Email)</th> </tr> </thead> <tbody> <tr> <td>₹ 40.00</td> <td>₹ 35.00</td> <td>₹ 18.00</td> </tr> </tbody> </table>	Account opening with ePRAN card (in Rs.)			Account opening with Physical PRAN card in (Rs.)	Welcome kit in hardcopy	eWelcome kit (Email)	₹ 40.00	₹ 35.00	₹ 18.00
Account opening with ePRAN card (in Rs.)												
Account opening with Physical PRAN card in (Rs.)	Welcome kit in hardcopy	eWelcome kit (Email)										
₹ 40.00	₹ 35.00	₹ 18.00										
		Father's Name, Mother's Name	(a) If the name has more than 30 digits, fill Annexure II for the same. (b) If the applicant is an Orphan, he/she may leave the fields blank. However, an official document to support the status to be submitted.									
		Politically Exposed Person	Politically Exposed Persons' (PEPs) are individuals who are or have been entrusted with prominent public functions such as heads of state or of the government, senior politicians, senior government, judicial or military officials, senior executives of state-owned corporations, important political party officials.									
2	2	Proof of Identity and Address	If the NRI applicant is submitting Aadhaar as proof of Identity and Address, the first 8 digits of the Aadhaar number should be redacted / masked on the submitted copy									
3	3	Current Address	Providing current address is mandatory. The submitted address proof should contain the current address as provided in the form.									
4	5	Bank Details	Applicant is required to provide the details of NRE/NRO account only. Bank details and documentary proof are mandatory in NPS. Please submit a cancelled cheque / copy of bank passbook / bank statement / bank certificate / letter from Bank containing applicant's Name, Bank Name, Bank Account Number and IFS / SWIFT Code.									
5	6	Nomination Details	(a) If a subscriber has family at the time of making a nomination, the nomination shall be in favor of one or more persons belonging to his/her family. Any nomination made in favour of a person not belonging to family shall be invalid; A fresh nomination shall be made by the subscriber upon marriage and any nomination made before such marriage shall be deemed to be invalid; If at the time of making a nomination the subscriber has no family, the nomination may be in favor of any person or persons but if the subscriber subsequently acquires a family, such nomination shall forthwith be deemed to be invalid and the subscriber shall make a fresh nomination in favour of one or more persons belonging to his family. (b) Please mention relationship as per "Nomination relationship matrix" provided below: <table border="1"> <thead> <tr> <th>Unmarried Subscriber</th> <th>Married / Widow / Widower / Divorcee Subscriber</th> </tr> </thead> <tbody> <tr> <td>1. Mother, 2. Father, 3. Please specify the relationship</td> <td>1. Spouse (Only for Married), 2. Son, 3. Daughter, 4. Mother, 5. Father, 6. Mother in Law (Only for Female and Transgender), 7. Father in Law (Only for Female and Transgender), 8. Daughter in Law, 9. Grandson, 10. Granddaughter</td> </tr> </tbody> </table> (c) In case of more than one nominee, the percentage share for each nominee should be in whole numbers and must be equal to 100.	Unmarried Subscriber	Married / Widow / Widower / Divorcee Subscriber	1. Mother, 2. Father, 3. Please specify the relationship	1. Spouse (Only for Married), 2. Son, 3. Daughter, 4. Mother, 5. Father, 6. Mother in Law (Only for Female and Transgender), 7. Father in Law (Only for Female and Transgender), 8. Daughter in Law, 9. Grandson, 10. Granddaughter					
Unmarried Subscriber	Married / Widow / Widower / Divorcee Subscriber											
1. Mother, 2. Father, 3. Please specify the relationship	1. Spouse (Only for Married), 2. Son, 3. Daughter, 4. Mother, 5. Father, 6. Mother in Law (Only for Female and Transgender), 7. Father in Law (Only for Female and Transgender), 8. Daughter in Law, 9. Grandson, 10. Granddaughter											
6	7	Selection of Pension Fund (PF) & Investment Choice	(1) Corporate applicants may exercise these choices if the option is extended to them by the employer or else may be ignored. (2a) Balanced Life Cycle Fund : Equity, Corporate Debt and G-Sec allocation is 50:30:20 until age 45 and allocation to Equity and Corporate Debt automatically reduces from 45 years to 55 years of age. (2b) Active Choice - Subscriber can actively decide his / her allocation into Equity / Corporate Debt / G-Sec / Alternate assets. (2c) Auto Choice - Equity allocation is 75% / 50% / 25% under Conservative / Moderate / Aggressive choice opted by the subscriber and allocation to equity and corporate debt automatically reduces from age 35 years to 55 years.									
7	9	FATCA & CRS Declaration	Clarification / Guidelines on filling details if applicant residence for tax purposes in jurisdiction(s) outside India: <ul style="list-style-type: none"> • Jurisdiction(s) of Tax Residence: Since US taxes the global income of its citizen, every US citizen of whatever nationality, is also a resident for tax purpose in USA. • Tax identification Number (TIN): TIN need not be reported if it has not been issued by the jurisdiction. However, if the said jurisdiction has issued a high integrity number with an equivalent level of identification (a "Functional equivalent"), the same may be reported. Examples of that type of number for individual include, a social security/insurance number, citizen/personal identification/services code/number and resident registration number) • In case applicant is declaring US person status as 'No' but his/her Country of Birth is US, document evidencing Relinquishment of Citizenship should be provided or reasons for not having relinquishment certificate is to be provided. • In case applicant is declaring US person status as 'Yes', 'father name' and PAN are mandatory alongwith details required in section 9 of form 									
8	9 & 10	Declaration / Signature by Applicant	In case the applicant is unable to affix signature, Left Thumb Impression in case of male and Right Thumb Impression in case of female should be affixed and in case there is no hands, toe impression of the applicant to be provided. The thumb / toe impression should be attested by two persons, one of whom should be the authorised official of PoP attesting the same under his/her official seal and stamp.									

Applicable CRA Charges (Excluding taxes)	Protean CRA
Account Opening Charges	Please refer sr. no. 1 above
Account Maintenance Charges (p.a.)	₹ 69
Charge per transaction	₹ 3.75

Nomination Relationship Matrix (Please mention relationship as per details given below)			
Marital Status	Male	Female	Transgender
Unmarried	1. Mother 2. Father 3. Please specify the relationship if any other person	1. Mother 2. Father 3. Please specify the relationship if any other person	1. Mother 2. Father 3. Please specify the relationship if any other person
Married	1. Spouse 2. Son 3. Daughter 4. Mother 5. Father 6. Daughter in Law 7. Grandson 8. Granddaughter	1. Spouse 2. Son 3. Daughter 4. Mother 5. Father 6. Mother in Law 7. Father in Law 8. Daughter in Law 9. Grandson 10. Granddaughter	1. Spouse 2. Son 3. Daughter 4. Mother 5. Father 6. Mother in Law 7. Father in Law 8. Daughter in Law 9. Grandson 10. Granddaughter
Widow/Widower	1. Son 2. Daughter 3. Mother 4. Father 5. Daughter in Law 6. Grandson 7. Granddaughter	1. Son 2. Daughter 3. Mother 4. Father 5. Mother in Law 6. Father in Law 7. Daughter in Law 8. Grandson 9. Granddaughter	1. Son 2. Daughter 3. Mother 4. Father 5. Mother in Law 6. Father in Law 7. Daughter in Law 8. Grandson 9. Granddaughter
Divorcee	1. Son 2. Daughter 3. Mother 4. Father 5. Daughter in Law 6. Grandson 7. Granddaughter	1. Son 2. Daughter 3. Mother 4. Father 5. Mother in Law 6. Father in Law 7. Daughter in Law 8. Grandson 9. Granddaughter	1. Son 2. Daughter 3. Mother 4. Father 5. Mother in Law 6. Father in Law 7. Daughter in Law 8. Grandson 9. Granddaughter

General Information for Subscribers

- a) The Subscriber can obtain the status of his/her application from CRA and respective Point of Presence (PoP).
- b) Subscribers are advised to retain the acknowledgement slip signed/ stamped by PoP/PoP-SP where they submit the application.
- c) For more information / clarifications, contact CRA:

Website: <https://www.npscra.nsdl.co.in>
 Call: 022-4090 4242
 Address: Central Recordkeeping Agency (CRA)
 Protean eGov Technologies Limited
 (formerly NSDL e-Governance Infrastructure Limited)
 1st Floor, Times Tower, Kamala Mills Compound, Senapati Bapat Marg, Lower Parel (W), Mumbai - 400013

Annexures - Subscriber Registration Form for NRI/OCI applicants (Tick and fill applicable annexures below) **Annexure I - हिंदी में प्रिंट करने हेतु**

आवेदक का नाम	
मध्यनाम	
उपनाम	
पिता / माता का नाम	
मध्यनाम	
उपनाम	

 Annexure II - If characters of name exceeded the space provided on page 1 of the application form

Applicant's First Name	
Middle Name	
Last Name	
Father's First Name	
Middle Name	
Last Name	
Mother's First Name	
Middle Name	
Last Name	

 Annexure III - Additional Nomination

Percentage Share	Nominee I		Nominee II		Nominee III		Total should be equal to 100%
Nominee I	Nominee I - Name	F i r s t	M i d d l e	L a s t			
	Relationship	Age		Date of Birth (in case of Minor)	D D / M M / Y Y Y Y		
	Name of Guardian (if nominee is a minor)	F i r s t	M i d d l e	L a s t			
Nominee II	Nominee II - Name	F i r s t	M i d d l e	L a s t			
	Relationship	Age		Date of Birth (in case of Minor)	D D / M M / Y Y Y Y		
	Name of Guardian (if nominee is a minor)	F i r s t	M i d d l e	L a s t			
Nominee III	Nominee III - Name	F i r s t	M i d d l e	L a s t			
	Relationship	Age		Date of Birth (in case of Minor)	D D / M M / Y Y Y Y		
	Name of Guardian (if nominee is a minor)	F i r s t	M i d d l e	L a s t			

Name of the Applicant	
Place	
Date	D / D / M / M / Y / Y / Y / Y

Signature / Thumb Impression* of Applicant
(refer instructions)