



Scheme Preference Change: Tier II 

## (i). PENSION FUND SELECTION:

PFM Name (Please select only one)	Please Tick (✓) only one
Aditya Birla Sun Life 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"/>
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). Active Choice Asset Allocation (to be filled up only in case you have selected the 'Active Choice' investment option)**

Asset Class	E (Cannot exceed 75%)	C (Max up to 100%)	G (Max up to 100%)	Total	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%	

Please note:

- Upto 50 years of age, the maximum permitted Equity Investment is 75% of the total asset allocation.
- From 51 years and above, maximum permitted Equity Investment will be as per the equity allocation matrix provided in **Annexure A**. The tapering off of equity allocation will be carried out as per the matrix on date of birth.
- The total allocation across E, C, G and A 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.

**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 &amp; belief.

Date :

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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:**

Tier I

Tier II

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. 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<sup>#</sup> 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 POP.
- For more details on scheme preference change, you may visit CRA website ([www.npscra.nsdl.co.in](http://www.npscra.nsdl.co.in)).

### Equity Allocation Matrix for Active Choice

Age (years)	Max. Equity Allocation
Upto 50	75%
51	72.50%
52	70%
53	67.50%
54	65%
55	62.50%
56	60%
57	57.50%
58	55%
59	52.50%
60 & above	50%

Please note:

1. Upto 50 years of age, the maximum permitted Equity Investment is 75% of the total asset allocation.
2. From 51 years and above, maximum permitted Equity Investment will be as per the equity allocation matrix provided above. The tapering off of equity allocation will be carried out as per the matrix on date of birth.