

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

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

For POP-SP use: POP-SP Registration No. : \_\_\_\_\_

Receipt No.: 

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

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

PRAN \*: 

--	--	--	--	--	--	--	--	--	--

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

Scheme Preference Change: Tier I  Tier II

**(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:

1. In case you select Active Choice fill up section (iii) below and if you select Auto Choice fill up section (iv) below.
2. In case you do not indicate any investment option, your funds will be invested in Auto Choice (LC 50).
3. 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).

4.

**(iii). 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%)	A # (Cannot exceed 5%)	Total	Note:1. Asset class E-Equity and related instruments; Asset class C-Corporate debt and related instruments; Asset class G-Government Bonds and related instruments; Asset Class A-Alternative Investment Funds including instruments like CMBS, MBS, REITS, AIFs, Invlts etc
Specify %					100%	

#As per existing NPS guidelines, option to select Asset Class – A is available only for Tier I. In case, you have filled up Asset Class – A for Tier II, your application shall be summarily rejected.

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 in **Annexure A**. The tapering off of equity allocation will be carried out as per the matrix on date of birth.
3. 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		
LC50		
LC25		

CRA generated Acknowledgement Number (to be filled by POP-SP): \_\_\_\_\_

Subscriber's Signature/ Thumb Impression	<b>For POP/POP-SP use:</b>	<b>POP/POP-SP Stamp:</b>
	_____ Name & Signature	

**(Perforation) - Acknowledgement to the Subscriber**

(To be filled by POP/POP-SP)

**Scheme Preference change/switch:**     Tier I     Tier II

POP-SP Registration Number: \_\_\_\_\_    PRAN:    [ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ]

Name of the Subscriber: \_\_\_\_\_    Date: \_\_/\_\_/\_\_    Time Stamp: \_\_\_\_\_

Receipt Number  
(To be provided by POP/POP-SP)    [ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ]

1. POP Transaction Charges:    [Rs. ]    2. Tax as applicable:    [Rs. ]

3. Total Charges:    [Rs. ]    \_\_\_\_\_

\_\_\_\_\_  
Signature/Stamp of POP/POP-SP/Place

**Instruction for filling the Form:**

- All fields marked with (\*) are mandatory. All Dates should be in DDMMYYYY Format.
- The Subscribers shall submit the application to POP-SP through which they have registered with CRA.
- For more details on switch of scheme, you may visit CRA website (www.npscra.nsdl.co.in).
- Separate forms to be submitted for Tier I and Tier II

<b>Subscriber Scheme Preference</b>
<p><u>Active choice</u></p> <p>1. PFM selection is mandatory. The form shall be rejected if a PFM is not opted for.</p> <p>2. Allocation under Equity (E) cannot exceed 75%</p> <p>3. A Subscriber opting for active choice may select the available asset classes (“E”, “C”, “G”, &amp; “A”). 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.</p> <p><u>Auto choice</u></p> <p>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.</p> <p>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.</p> <p><b>In case both the investment option and the asset allocation are left blank, the Subscriber's funds will be invested as per Auto Choice</b></p>

**Equity Allocation Matrix for Active Choice**

<b>Age (years)</b>	<b>Max. Equity Allocation</b>
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.