

# TIER II DETAILS

I hereby submit the following details for activation of Tier – II account under NPS.

1. PAN card Number (Mandatory) :

2. Subscribers Bank Details: (Mandatory)

If same as Tier I, Please Tick (✓)  else, provide the details below: Savings A/c  Current A/c

Bank A/c Number \*

Bank Name\*

Bank Branch\*

Bank Branch Address\*

Pin Code\*

Bank Branch IFSC Code\*

Bank MICR Code (Wherever applicable)

### Subscriber's Nomination Details

If same as Tier I, Please Tick (✓)  else, provide the details below. In case you desire to nominate more than one person, please fill Annexure III.

3. Name of the Nominee:

First Name	Middle Name	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>

4. Date of Birth (In case of Minor)

5. Relationship with the Nominee:

6. Nominee's Guardian Details (in case of a minor):

First Name	Middle Name	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>

**Subscriber Scheme Preference** (Please refer offer document for further details):

7. (i). Pension Fund (PF) Selection (Select only one PF): Selection of PFM is mandatory both in Active and Auto Choice.

If same as Tier I, Please Tick (✓)  else, provide the details below.

Pension Fund Name	Please tick only one (✓)
LIC Pension Fund Limited	<input type="checkbox"/>
SBI Pension Funds Private Limited	<input type="checkbox"/>
UTI Retirement Solutions Limited	<input type="checkbox"/>
ICICI Prudential Pension Funds Management Company Limited	<input type="checkbox"/>
Kotak Mahindra Pension Fund Limited	<input type="checkbox"/>
HDFC Pension Management Company Limited	<input type="checkbox"/>
Birla Sunlife Pension Management Limited	<input type="checkbox"/>

**(ii). Investment Option** ( Please Tick (✓) in the box given below showing your investment option)

<b>Active Choice</b>	<b>Auto Choice</b>	<b>(For details on Auto Choice, please refer to the Offer Document)</b>  (a) In case you do not indicate any investment option, your funds will be invested in Auto Choice  (b) In case you have opted for Auto Choice, DO NOT fill up section (iii) below relating to Asset Allocation. In case you do, the Asset Allocation instructions will be ignored and investment made as per Auto Choice.
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**(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	G	Total	Asset class E-Equity and related instruments; Asset class C-Corporate debt and related instruments; Asset class G-Government Bonds and related instruments;  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 asset allocation matrix provided in Annexure CSRF IV. 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 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. 4. In case of Active Choice, if the equity asset allocation selected is more than what has been permitted as per PFRDA guidelines (e.g. a person of age 53 selecting 75% in equity as against permitted limit), the permitted limit will be allotted in remaining portion will be allocated to asset class G.
				<b>100%</b>	

**(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	Note:
LC 75	<input type="checkbox"/>	<b>1. LC 75 - It is the Life cycle fund where the Cap to Equity investments is 75% of the total asset</b> <b>2. LC 50 - It is the Life cycle fund where the Cap to Equity investments is 50% of the total asset</b> <b>3. LC 25 - It is the Life cycle fund where the Cap to Equity investments is 25% of the total asset</b>
LC 50	<input type="checkbox"/>	
LC 25	<input type="checkbox"/>	

**Declaration & Authorization by subscriber**

I have read and understood the terms and conditions of the National Pension System and hereby agree to the same and declare that the information and documents furnished by me are true and correct, to the best of my knowledge and belief. I undertake to inform immediately the National Pension System Trust, of any change in the above information furnished by me. 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.

I further agree to be bound by the terms and conditions of provision of services by CRA, from time to time and any amendment thereof as approved by PFRDA, whether complete or partial without any new declaration being furnished by me. I shall be bound by the terms and conditions for the usage of I-pin (to access CRA and view details) & T-pin on the CRA website.

Declaration under the Prevention of Money Laundering Act, 2002

I hereby 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

Subscriber in black ink

(\* LTI in case of male and RTI in case of female)

**To be filled by POP/POP(SP)**POP-SP Registration Number Copy of PAN Card Submitted YES  NO 

		Name:
		Designation:
		Place:
POP-SP Seal	Signature of Authorised Signatory	Date: <input type="text"/>