

National Pension System

Application Form for Corporate Scheme Preference Change

(Please fill all the details in CAPITAL LETTERS & in BLACK INK only. All Fields mark with * are mandatory.)

Corporate Registration Number* :

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Sir/Madam,

We hereby submit a request for Scheme preference change. The necessary details are provided below:

1. Name of the Corporate*:

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2. Phone No.*:

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(STD code)

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(Phone No.)

Mobile No.

+	9	1
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+	9	1
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3. Details of Scheme Preference*: Selection of Scheme preference by: **Subscriber** **Corporate**

4. If choice of investment is to be made by the Corporate on behalf of the employees (selected as Corporate in clause no. 3) then the following fields are mandatory:

A. PFM Selection*:

PFM Name (in alphabetical order)	Please tick only one (Select only one PFM)
Aditya Birla Sun Life Pension Management Limited	<input type="checkbox"/>
Axis Pension Fund Management Limited	<input type="checkbox"/>
HDFC Pension Management Company Ltd.	<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"/>
MAX Life Pension Fund Management Limited	<input type="checkbox"/>
SBI Pension Funds Private Limited	<input type="checkbox"/>
TATA Pension Management Limited	<input type="checkbox"/>
UTI Retirement Solutions Limited	<input type="checkbox"/>

B. Investment Choice : (In case you do not indicate any investment option, your funds will be invested in Auto Choice.)

Active Choice **Auto Choice**

Asset Allocation (Please, indicate asset allocation pattern if Active Choice is selected)

Asset Class	E(Cannot exceed 75%)	C	G	A(Cannot exceed 5%)	Total
% share					100%

C. 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
LC 75		
LC 50		
LC 25		

We hereby declare and agree that we have read and understood the Offer Document, terms and conditions. We further declare that the information supplied in the application, is complete and true. And we will notify Central Recordkeeping Agency (CRA) immediately about any change in the information provided in the application.

Corporate Head Office Stamp	Signature of Authorised Signatory	
	Name : _____	Place : _____
	Designation : _____	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"/>
	Department : _____	D D M M Y Y Y Y

To be Filled by POP

POP Registration No.

POP Stamp	Signature of Authorised Signatory	
	Name : _____	Place : _____
	Designation : _____	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"/>
	Department : _____	D D M M Y Y Y Y

[To be filled by CRA]

Received by: _____

Received at: _____ Date : _____

Acknowledgement Number

Note :

1. Corporate has to select one PFM out of the latest list of PFMs who would invest the fund as per selected investment choice.
2. Please visit PFRDA website: www.pfrda.org.in for latest list of PFMs.