Request for Scheme Preference Change under National Pension System (NPS)
NSDL e-Governance Infrastructure Limited
(Please fill all the details in CAPITAL LETTERS & in BLACK INK only.)

For Nodal Office# use: Nodal Office Registration No. :_____

Receipt No.: [ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ]   Receipt Date: ___/___/____
(Mandatory for POP/POP-SP)

PRAN *: [ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ]   Name of the Subscriber *: _____

Scheme Preference Change: Tier I [ ]

I. Default Pension Funds (PFs): [ ]

   The following Pension Funds (PFs) will act jointly as default PFs:
   (a) LIC Pension Fund Limited (b) SBI Pension Funds Pvt. Limited (c) UTI Retirement Solutions Ltd.

II. Subscriber Scheme Choice [ ]

   In case of Central Autonomous Bodies (CAB)/ State Government (SG)/State Autonomous Bodies (SAB) employees, selection made under this section is allowed only if choice to employees is notified by the respective State Govt/Ministry.

(i). PENSION FUND SELECTION:

PFM Name (Please select only one)	Please Tick (√) only one
Birla Sunlife Pension Management Limited	[ ]
HDFC Pension Management Company Limited	[ ]
ICICI Prudential Pension Funds Management Company Limited	[ ]
Kotak Mahindra Pension Fund Limited	[ ]
LIC Pension Fund Limited	[ ]
SBI Pension Funds Private Limited	[ ]
UTI Retirement Solutions Limited	[ ]

   * Selection of 01 Pension Fund is mandatory

(ii). INVESTMENT OPTION [Please Tick (√) in the box given below showing your investment option. Please tick only one, either Active Choice or Auto Choice].

   1. **ACTIVE CHOICE** [ ]

Asset Class G 100%	Please Tick (√)	Note: 1. Asset class G-100% of contribution will be invested in Government Bonds and related instruments 2. In case of Government employee/subscriber the Active choice of Asset Allocation is restricted to Asset Class 'G' only
	[ ]	

   2. **AUTO CHOICE** [ ]

Life Cycle (LC) Funds	Please Tick (√) Only One	Note: 1. Govt. employee can exercise Auto Choice of Asset Allocation for LC 25 & LC 50 only
LC50		2. LC 50- It is the Life cycle fund where the Cap to Equity investments is 50% of the total asset
LC25		3. LC 25- It is the Life cycle fund where the Cap to Equity investments is 25% of the total asset.

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 & belief.

Date : [ ][ ][ ][ ][ ][ ][ ][ ]
           D D M M Y Y Y Y

Signature/ Thumb
Impression of the Subscriber

Scheme Preference Change: **Tier II** ☐

(i). PENSION FUND SELECTION:

PFM Name (Please select only one)	Please Tick (√) only one
Birla Sunlife Pension Management Limited	☐
HDFC Pension Management Company Limited	☐
ICICI Prudential Pension Funds Management Company Limited	☐
Kotak Mahindra Pension Fund Limited	☐
LIC Pension Fund Limited	☐
SBI Pension Funds Private Limited	☐
UTI Retirement Solutions Limited	☐

(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).

(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:

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
LC75		2. LC 50- It is the Life cycle fund where the Cap to Equity investments is 50% of the total asset
LC50		3. LC 25- It is the Life cycle fund where the Cap to Equity investments is 25% of the total asset
LC25		

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 & belief.

Date :

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[#] 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).

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.