Annexure S3 (Ver 1.2)	<u>Page 1</u>	
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.:	eipt 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 A		
n case you do not indicate a choice of PFM, your application form shall be summarily rejected	<u>.</u>	
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		
HDFC Pension Management Company Limited		
ICICI Prudential Pension Funds Management Company Limited		
Kotak Mahindra Pension Fund Limited		
LIC Pension Fund Limited		
Reliance Capital Pension Fund Limited		
SBI Pension Funds Private Limited		
UTI Retirement Solutions Limited		
:) Investment Ontion (Diana Tink ()) in the bar given below above in a second antion	1	
ii). Investment Option: [Please Tick (√) in the box given below showing your investment option         Active Choice         Auto Choice	1	
Please note:		
<ol> <li>In case you select Active Choice fill up section (iii) below and if you select Auto Choice fill up section (iv) below.</li> <li>In case you do not indicate any investment option, your funds will be invested in Auto Choice (LC 50).</li> </ol>		
3. In case you have opted for Auto Choice and fill up section (iii) below relating to Asset Allocation, the Asset Alloca and investment will be made as per Auto Choice (LC 50).	ation instructions will be ignored	
4. iii). Asset Allocation (To be filled up only in case you have selected the 'Active Choice' investm	ent option)	
E C G A#		
Asset Class (Cannot (Max up to (Max up to	; Asset class G-Government Bonds	
	and related instruments; Asset Class A-Alternative Investment Funds including instruments like CMBS, MBS, REITS, AIFs, Invlts etc	

#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.
- 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.

$\begin{array}{c c} \text{Life Cycle} \\ \text{(LC)Funds} \\ \hline \\ \text{LC75} \end{array} Please Tick () O$	Note:1. LC 75- It is the Life cycle fund wh 2. LC 50- It is the Life cycle fund wh	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	
LC50	3. LC 25- It is the Life cycle fund wh		
LC25			
CRA generated Acknowledgem	ent Number (to be filled by POP-SP):		
	For POP/POP-SP use:	POP/POP-SP Stamp:	
Subscriber's Signature/ Thumb Impression	Name & Signature		
	(Perforation) - Acknowledgement to the	Subscriber	
e filled by POP/POP-SP) me Preference change/switch:	] Tier I Tier II		
SP Registration Number:	PRAN:		
e of the Subscriber:	Date:	_/_/ Time Stamp:	
pt Number e provided by POP/POP-SP)			
P Transaction Charges:	Rs. 2. Tax as applic	able: Rs.	
otal Charges: Rs.			
		Signature/Stamp of POP/POP-SP/Place	
	Instruction for filling the For	rm:	
• The Subscribers shall subm	e mandatory. All Dates should be in DDMMYYY hit the application to POP-SP through which they of scheme, you may visit CRA website (www.np itted for Tier I and Tier II	have registered with CRA.	
	Subscriber Scheme Preference	e	
<ol> <li>Allocation unde</li> <li>A Subscriber of However, the subscriber of</li> </ol>	s mandatory. The form shall be rejected if a PFM r Equity (E) cannot exceed 75% opting for active choice may select the availa um of percentage allocation across all the selecte cations is not equal to 100%, or the asset allocation	ble asset classes ("E", "C", "G", & "A"). d asset classes must equal 100. If the sum of	
Subscriber does 5. In case of Auto	pting for Auto Choice must also select a PFI not indicate his/her choice of PFM. Choice, DO NOT fill up section for Asset Allo l be ignored and investment will be made as per A	cation. In case you do, the Asset Allocation	
	vestment option and the asset allocation are		

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%

## **Equity Allocation Matrix for Active Choice**

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.