*E.C. No.

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National Pension System (NPS) - Request for Subscriber Shifting NSDL e-Governance Infrastructure Limited

(Please fill all the details in CAPITAL LETTERS & in BLACK INK only. All fields / sections marked in * are mandatory.)
Section A - General Information (Mandatory for all Subscribers. Please tick the respective block which is applicable.)
I) Subscriber's Name *:
II) PRAN (Permanent Retirement Account Number) *:
III) Existing PRAN association (Refer Instruction No. I)
a) Sector: * Central Government State Government All Citizens of India (UOS) Corporate Sector
b) DDO / CBO / POP-SP Reg. No: * DDO / CBO / POP-SP Name: *
IV) Target PRAN association (Refer Instruction No. II)
a) Sector: * Central Government State Government All Citizens of India (UOS) Corporate Sector
b) DDO / CBO / POP-SP Reg. No: *_6567304 DDO / CBO / POP-SP Name: *_Baroda U, P, Bank
V) PAN
VI) Aadhaar
I hereby authorize CRA registered with Pension Fund Regulatory and Development Authority (PFRDA) to use my Aadhaar details for National Pension System (NPS) and authenticate my identity through the Aadhaar Authentication system (Aadhaar based e-KYC services of UIDAI) in accordance with the provisions of the Aadhaar (Targeted Delivery of Financial and other Subsidies, Benefits and Services) Act, 2016 and the allied rules and regulations notified thereunder. I understand that the Aadhaar details (physical and / or digital, as the case maybe) submitted for availing services under NPS will be maintained in NPS till the time the account is not inactive in NPS or the timeframe decided by PFRDA, the regulator of NPS, whichever is later. I understand that Security and confidentiality of personal identity data provided, for the purpose of Aadhaar based authentication is ensured by CRA registered with PFRDA till such time it is acting as CRA for my NPS account.
VII) Nomination Details* (Mandatory - You can nominate up to a maximum of 3 nominees and if you desire so please fill Additional
Nomination Form provided on Page 5&6. Please refer to Instruction No. VI.)
Nominee's Name: :
(First Name) (Middle Name) (Last Name)
Relationship with the Nominee: Date of Birth (In Case of Minor): D D M M Y Y Y Y
Nominee's Guardian Details (in case of a minor) : (First Name) (Middle Name) (Last Name)
Section B - Additional information for Subscribers shifting to Government Sector (All Details are Mandatory)
[Subscriber's Employment Details to be filled and attested by DDO. Please refer to Instruction No. IX & X]
a) Date of Joining: (dd/mm/yyyy) b) Date of Retirement: (dd/mm/yyyy)
c) Group of the Employee: A B C D
d) Office:
e) Department:
f) Ministry:
g) Basic Salary:
h) Pay Scale:
Certified that the above declaration has been signed / thumb impressed before me by after he / she has read the entries / entries have been read over to him / her by me and got confirmed by him / her. Also certified that the employment details are as per employee records available with the Department
Signature of the Authorised Person Rubber Stamp of the DDO
Designation of the Authorised Person Name of the DDO
Date Department / Ministry

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*Section C - Additional information for Subscribers shifting to All Citizens of India (UOS) & Corporate Sector
I. Subscriber Scheme Preference*:
Do you wish to continue with the existing Pension Fund and Investment Option: Yes No (If 'No, please submit details on Page 4)
 If Subscriber is shifting to Corporate sector, applicable only if the target Corporate has given the option of selecting scheme preference to the associated employees.
• If Subscriber is shifting from Government Sector, please submit Subscriber Scheme Preference details on Page 4.
II. KYC details* (Applicable only if Subscriber is shifting from Government Sector. Refer Instruction No. XII)
a) KYC document accepted for Identify Proof:
b) KYC document accepted for Address Proof :
c) Document accepted for Date of birth proof :
d) Existing Bank Customer: I/we hereby certify/confirm that Shri/Smt/Kum
III. Employment Details* (Applicable if Subscriber is shifting to Corporate Sector. To be verified by the Corporate Office of the Subscriber.)
a) Date of Joining*: b) Date of Retirement*:
D D M M Y Y Y Y D D M M Y Y Y Y
c) Employee ID*: d) CHO Reg No*: 5 5 6 6 0 1 3
Certified that the above declaration has been signed before me by after he / she has read the entries / entries have been read over to him / her by me and got confirmed by him / her. Also certified that the employment details are as per employee records available with the Corporate.
Signature of the Authorised Person
Designation of the Authorised Person Rubber Stamp of the Corporate
Declaration (Applies to Subscribers across all sectors):
I agree to be bound by the terms and conditions for the target sector (in which my PRAN will belong after processing of this Intersector Shifting request) and understand that CRA may, as approved by PFRDA, amend any of the services completely or partially without any new Declaration / Undertaking being signed. Further, I agree to pay all the necessary charges, as applicable, of the target sector.
Date Signature/Left Thumb impression of Subscriber*
For Office use only (To be filled up by the officer accepting the form)
Received by: Nodal Office Registration Number:
Received at: Date: Time Stamp
Details verified by: Time stamp
Receipt Number issued by the receiving office (only for POP-SP)

- Details of the DDO / CBO / POP-SP with which the PRAN is currently associated.
- II. Details of the DDO / CBO / POP-SP with which the PRAN will be associated after shifting.
- III. Please quote the correct PRAN and attach a copy of the PRAN card.
- IV. This form is to be used by the Subscriber only.
- V. Sector for 'Existing PRAN association' and 'Target PRAN association' can be the same only if a Subscriber is shifting from one State Government to another State.
- VI. In case of more than one nominee, percentage share value for all the nominees must be integer. Decimals/Fractional values shall not be accepted in the nomination(s). Sum of percentage share across all the nominees must be equal to 100. If sum of percentage is not equal to 100, entire nomination will be rejected.
- VII. Active choice Under Active choice, Subscribers have an option to choose a fund manager and provide the ratio in which his / her funds are to be invested among asset classes.
 - a) PFM selection is mandatory. The form shall be rejected if a PFM is not opted for.
 - b) Allocation under Equity (E) cannot exceed 75%.
 - c) A Subscriber opting for active choice may select the available asset classes ("E", "C", "G", & "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.
- VIII.Auto choice Under Auto choice investment will be made in a lifecycle fund in the schemes of PFM chosen by Subscriber.
 - a) A Subscriber opting for Auto Choice must also select a PFM. The form shall be rejected if a PFM is not opted for.
 - b) In case both investment option and the asset allocation table are left blank, the Subscriber's funds will be invested as per Auto Choice.

For more details on investment options and asset classes, please refer to the scheme information available on CRA website (www.npscra.nsdl.co.in).

- IX. Employment details are to be captured in CRA system by the target PAO/DTO/DTA along with other details, if the Subscriber is shifting from UOS to Central / State Government sector.
- X. Nodal Office have to modify the employment details of the Subscriber after the shifting of the PRAN, in case of Subscriber Shifting from Central Government to State Government or vice versa or across two State Governments, i.e, both existing and new PRAN association are Government Sectors.
- XI. On execution of Subscriber Shifting request, Nodal Office shall ensure that the Subscriber is FATCA compliant in the CRA system (Applicable if subscriber is registered on/after July 1, 2014).

XII. Illustrative list of documents acceptable as proof of identity and address.

S.No	Proof of Identity (Copy of any one)	S.No	Proof of Address (Copy of any one)
1	Passport issued by Government of India.	1	Passport issued by Government of India
2	Ration card with photograph.	2	Ration card with photograph and residential address
3	Bank Pass book or certificate with Photograph.	3	Bank Pass book or certificate with photograph and residential address
4	Certificate of the POP bank for an existing Bank customer.	4	Certificate of the POP bank for an existing Bank customer.
5	Voters Identity card with photograph and residential address.	5	Voters Identity card with photograph and residential address
6	Valid Driving license with photograph	6	Valid Driving license with photograph and residential address
7	Certificate of identity with photograph signed by a Member of Parliament or Member of Legislative Assembly	7	Letter from any recognized public authority at the level of Gazetted officer like District Magistrate, Divisional commissioner, BDO, Tehsildar, Mandal Revenue Officer, Judicial Magistrate etc.
8	PAN Card issued by Income tax department	8	Certificate of address with photograph signed by a Member of Parliament or Member of Legislative Assembly
9	Aadhar Card / letter issued by Unique Identification Authority of India	9	Aadhar Card / letter issued by Unique Identification Authority of India clearly showing the address
10	Job cards issued by NREGA duly signed by an officer of the State Government	10	Job cards issued by NREGA duly signed by an officer of the State Government
11	Identity card issued by Central/State government and its Departments, statuary/ Regulatory Authorities, Public Sector Undertakings, Scheduled commercial Banks, Public Financial Institutions, Colleges affiliated to universities and Professional Bodies such as ICAI, ICWAI, ICSI, Bar Council etc.	11	The identity card/document with address, issued by any of the following: Central/State Government and its Departments, Statuary/Regulatory Authorities, Public Sector Undertakings, Scheduled Commercial Banks, Public Financial Institutions for their employees.
12	Photo. Identity Card issued by Defence, Paramilitary and Police department's	12	Latest Electricity/water bill in the name of the Subscriber / Claimant and showing the address (less than 3 months old)
13	Ex-Service Man Card issued by Ministry of Defence to their employees.	13	Latest Telephone bill in the name of the Subscriber / Claimant and showing the address (less than 3 months old)
14	Photo Credit card.	14	Latest Property/house Tax receipt (not more than one year old)
		15	Existing valid registered lease agreement of the house on stamp paper (in case of rented/leased accommodation)
Note:	ou are required to bring original documents & two self-attested	photo	copies for verification.

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. SUBSCRIBI	ER SCHEME	PREFERE	ENCE:								
). PENSION	FUND SELEC	CTION – T	IER I (Se	lect only one PF	FM)						
PFM Na	PFM Name (in alphabetical order)						Please Tick (√) only one		2		
Birla Sunlife Pension Management Limited											
HDFC Pension Management Company Limi				ted							
ICICI Prudential Pension Funds Managemen				t Company Lim	ited						
Kotak Mahindra Pension Fund Limited											
LIC Pen	sion Fund Limi	ited									
Reliance	Capital Pension	on Fund Lin	nited								
SBI Pens	sion Funds Priv	ate Limited	i					<u> </u>			
UTI Reti	irement Solution	ons Limited						<u> </u>			
			and Auto C	Choice. In case yo	u do not ii	ndicate a cho	oice of PFM	 . your applica	tion form shall	be summarily rej	ected
3. In case	you do not ince you have opte	dicate any indicate display	nvestment Choice and	option, your fur	nds will b (iii) belo	e invested w relating	in Auto C	hoice (LC 50		cation instruction	is w
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Date:

Name of Subscriber : _

Place:

Signature/Thumb Impression* of Subscriber in black ink (* LTI in case of male and RTI in case of females) Form-ISS (Ver 1.2)

ADDITIONAL NOMINATION FORM

The details of nominees to whom the outstanding proceeds are withdrawn is to be provided hereu after opting for deferred withdrawal, all the out receiving the request and paid to the nominees	nder (Please refer instruction no: VI standing pension wealth present in t). Also, plea he NPS acco	se note that in case of demise of the Subscriber bunt of the Subscriber shall be withdrawn upon
obligation.			
I,who is/are member(s)/ of my family to receive the	an amount in my DDAN account and	h	ereby nominate the person(s) mentioned below
who is/are member(s)/ of my family to receive the	ne amount in my PKAN account unde	er National P	ension System in the event of my death.
1. Name of the Nominee*: 1st Nominee	2nd Nominee		3rd Nominee
First Name	First Name		First Name
Middle Name	Middle Name		Middle Name
Last Name	Last Name		Last Name
			-
2. Present Communication address of the Nor	minees*:		
Address of 1st Nominee	Address of 2nd Nominee		Address of 3rd nominee
3. Date of Birth* (Only in case of a minor. In D	D/MM/YYYY):	ı	
1st Nominee:/	2nd Nominee://		3rd Nominee:/
4. Relationship with the Nominee*: 1st Nominee	2nd Nominee		3rd Nominee
5. Percentage Share*:			
1st Nominee%	2nd Nominee	_%	3rd Nominee%
6. Nominee's Guardian Details (Only in case o	f a minor):	•	
1st Nominee's Guardian Details	2nd Nominee's Guardian Details	<u> </u>	3rd Nominee's Guardian Details
First Name	First Name		First Name
Middle Name	Middle Name		Middle Name
Last Name	Last Name		Last Name
		Signatur	re/ Thumb Impression* of the Subscriber
Dated thisday of20 at _			

TO BE FILLED/ATTESTED BY POP-SP/DDO	
Certified that the above declaration and nomination Sh/Smt/Ms after he / she have	details has been signed / thumb impressed before me by we read the entries / entries have been read over to him / her by me and got
confirmed by him / her.	Te read the entries / entries have been read over to min / her by the and got
Rubber stamp of the POP-SP/DDO	Signature of the Authorised Person
_	
POP-SP/DDO Registration Number(Allotted by CRA)	Designation of the Authorised Person :
	POP-SP/DDO Office Name
Date:	
TO BE FILLED/ATTESTED BY POP/POP SP/PAO/DTO/DT	
PrAO	(Allotted by CRA):
Rubber Stamp of the POP/POP-SP/PAO/DTO/DTA/PrAO	
	Signature of the Authorised Person

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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.