

Section C -Additional information for Subscribers shifting to All Citizens of India (UOS) & Corporate Sector

I. Subscriber Scheme Preferences Details*:

Do you wish to continue with the existing Pension Fund and Investment Option: Yes No (If 'No, please submit details as below)

- i) 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.
- ii) Corporate and Government Subscribers Shifting to All Citizen of India (UOS Sector) can shift with existing scheme choice also.

| Pension Fund* (Please Tick (√) one) | Investment Choice (Please Tick (√) one) | | | | | | | | | | |
|---|---|---------------|---------------|---------------|-------------|-------|----------|--------------|--------------|---------------|------|
| <input type="checkbox"/> Aditya Birla Sunlife Pension Mgmt Ltd <input type="checkbox"/> Axis Pension Fund Management Limited <input type="checkbox"/> DSP Pension Fund Managers Private Ltd <input type="checkbox"/> HDFC Pension Mgmt Co Ltd <input type="checkbox"/> ICICI Prudential Pension Funds Mgmt Co Ltd <input type="checkbox"/> Kotak Mahindra Pension Fund Ltd <input type="checkbox"/> LIC Pension Fund Limited <input type="checkbox"/> Max Life Pension Fund Mgmt Ltd <input type="checkbox"/> SBI Pension Funds Private Limited <input type="checkbox"/> TATA Pension Management Private Limited <input type="checkbox"/> UTI Retirement Solutions Limited | <input type="checkbox"/> Active Choice mention the % share in applicable asset class below <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 20%;">E (upto 75%)</th> <th style="width: 20%;">C (Upto 100%)</th> <th style="width: 20%;">G (Upto 100%)</th> <th style="width: 20%;">A (Upto 5%)</th> <th style="width: 10%;">Total</th> </tr> </thead> <tbody> <tr> <td>% Equity</td> <td>% Corp Bonds</td> <td>% Govt. Sec.</td> <td>% Alt. Assets</td> <td>100%</td> </tr> </tbody> </table> <p style="text-align: center;">OR</p> <input type="checkbox"/> Auto Choice Select one life cycle fund below Conservative (LC25) <input type="checkbox"/> Moderate (LC50) <input type="checkbox"/> Aggressive (LC75) <input type="checkbox"/> | E (upto 75%) | C (Upto 100%) | G (Upto 100%) | A (Upto 5%) | Total | % Equity | % Corp Bonds | % Govt. Sec. | % Alt. Assets | 100% |
| E (upto 75%) | C (Upto 100%) | G (Upto 100%) | A (Upto 5%) | Total | | | | | | | |
| % Equity | % Corp Bonds | % Govt. Sec. | % Alt. Assets | 100% | | | | | | | |

Selection of one PF is mandatory else form will be rejected. If no investment choice is selected, funds will be invested in Auto choice (LC 50)

II. KYC details* (Applicable only if Subscriber is shifting from Government Sector)

| | |
|---|---|
| Passport <input type="text"/> | Passport Expiry Date <input type="text"/> |
| Driving License <input type="text"/> | Driving License Expiry Date <input type="text"/> |
| Voter ID Card <input type="text"/> | Proof of possession of Aadhaar <input type="text"/> |
| NREGA Job Card <input type="text"/> | |
| National Population Register <input type="text"/> | |

- a) KYC document accepted for Identity proof : _____
- b) KYC document accepted for Address proof : _____
- c) Document accepted for Date of birth proof : _____
- b) **Existing Customer:**

I/we hereby certify/confirm that Shri/Smt/Kum is an existing KYC verified customer. The above applicant is having an operative Bank/Demat/Folio/..... account (specify nature of the account) having account number/ client ID maintained at branch/office. The KYC documents available with us for this customer/client matches the requirement for opening NPS account and are in compliance with PMLA Rules.

I/We further confirm that the Savings Bank a/c of Sh/Smt/Kum is not a 'Basic Savings Bank Deposit Account (applicable in case of Bank PoP).

III. Employment Details* (Applicable if Subscriber is shifting to Corporate Sector. To be verified by the Corporate Office of the Subscriber.)

| | |
|--|--|
| Date of Joining <input type="text"/> | Date of Retirement <input type="text"/> |
| Employee Code/ID <input type="text"/> | Non-mandatory if not available |
| CHO Registration Number <input type="text"/> | CBO Registration Number <input type="text"/> |

It is certified that _____ is employed with us and the details provided in this subscriber registration form including the address and employment details provided above are as per the service record of the employee maintained with us. It is further certified that he/she has read entries/ entries have been read over to him/herby her by us and got confirmed by him/her.

| |
|---|
| Name of the Authorised Person <input type="text"/> |
| Designation of the Authorised Person <input type="text"/> |
| Date <input type="text"/> |
| Place <input type="text"/> |

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 <input type="text"/> | 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: _____ | Date: _____ Time stamp _____ |

Receipt Number issued by the receiving office (only for POP-SP)