



## Name \*: First

Name \*:

[illegible]

Middle Name :

[illegible]

Last Name :

[illegible]

Designation \* :

[illegible]

Phone No. \* :

[illegible]

Mobile No.

[illegible]

STD Code

Phone Number

Email ID \* :

[illegible]

(Note : Email ID & Phone Number should be of the alternate Nodal Officer's and not of the HO's Email ID and any Board Number)

9.a. Corporate PAN Details\*:

[illegible]

9.b. Corporate TAN Details :

[illegible]

10. Corporate Office is Co-Contributor (Please tick only one):      Yes

7

No

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11. **Details of Scheme Preference\*** : Selection of Scheme preference by:

Subscriber

7

Corporate[

e

12. If choice of investment is to be made by the Corporate on behalf of the employees (selected as 'Corporate' in clause no. 11) then the following fields are mandatory:

**(i). PFM Selection for Active and Auto Choice\*:** (\*Name of the Pension Funds are given in alphabetical order.)

<b>PFM Name</b> (Please select only one)	<b>Please Tick (✓) only one</b>
Aditya Birla Sun Life Pension Management Limited	<input type="checkbox"/>
Axis Pension Fund Management Limited	<input type="checkbox"/>
DSP Pension Fund Managers Private Ltd.	<input type="checkbox"/>
HDFC Pension Fund Management Limited	<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"/>
SBI Pension Funds Private Limited	<input type="checkbox"/>
TATA Pension Management Private Limited	<input type="checkbox"/>
UTI Pension Fund Limited	<input type="checkbox"/>

(Selection of PFM is mandatory both in Active and Auto Choice. In case you do not indicate a choice of PFM, your application form shall be summarily rejected).

**(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 fund 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).
4. In case scheme preference is to be selected by Subscriber, then the Corporate should accordingly advise its Subscribers to provide the necessary information while filling up the Subscriber Registration Form.

**(iii) Asset Allocation (to be filled up only in case you have selected the 'Active Choice' investment option.):**

Asset Class	E (Cannot exceed 50%)	C (Max up to 100%)	G (Max up to 100%)	A (Cannot exceed 5%)	Total (100%)	Note: 1.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. 2.Asset class E-Equity and related instruments; Asset class C-Corporate debt and related instruments; Asset class G-Government Bonds and related instruments; Asset Class A-Alternative Investment Funds including instruments like CMBS, MBS, REITS, AIFs, Invlts etc
Specify %						

**(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, funds will be invested as per LC 50.)**

Life Cycle (LC) Funds	Please Tick (✓) Only One	Note: 1. LC 75- It is the Lifecycle 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
LC75		
LC50		
LC25		

13. CRA Charges to be borne by\* - Employer ☐ Employee ☐

We hereby declare and agree that we have read and understood the Offer Document, terms and condition. 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 Seal		
	Signature of Authorized Signatory	
	Name : _____	Place : _____
	Designation : _____	Date : <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> D D M M Y Y
Department : _____		

**To be Filled by POP**A. POP Registration No. B. Submitted KYC documents : Yes ☐ No ☐

POP Seal		
	Signature of Authorized Signatory	
	Name : _____	Place : _____
	Designation : _____	Date : <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> D D M M Y Y
Department : _____		

**[To be Filled by CRA]**

Received by: \_\_\_\_\_

Received at: \_\_\_\_\_ Date : \_\_\_\_\_

Acknowledgement Number (by CRA) **Note:**

- Corporate has to select one PFM out of the latest list of PFMs who would invest the fund as per selected investment choice.
- Examples of 'E', 'C', 'G' & 'A' mix are as follows:-

E (Equity)	C (Fixed Income)	G (Government Securities)	A (Alternative Investment Funds)
50% (max)	25%	20%	5%
50% (max)	20%	25%	5%
0%	50%	50%	0%
0%	100%	0%	0%
0%	0%	100%	0%
30%	25%	40%	5%
20%	50%	30%	0%

**Document to be Submitted to POP: Documents as a proof for KYC on the status of corporate/entity.**