

Request for Activation of Tier-II account under National Pension System (NPS)**Protean eGov Technologies Limited (Formerly NSDL e-Governance Infrastructure limited)**

To be used by Subscribers having a pre-existing Tier I account under NPS

(To avoid mistake(s), please read the accompanying instructions carefully before filling up the form)

For Nodal Office# use:

Nodal Office Registration No. : _____

Receipt No.:

(Mandatory for POP/POP-SP)

Entered By : _____ Date: _____ Verified By: _____ Date: _____

I hereby submit the following details for activation of Tier – II account under NPS.

Permanent Retirement Account Number (PRAN)*: _____

1. Subscriber's Name*:

(First Name)

(Middle Name)

(Last Name)

2. Bank Details* (All bank details are mandatory except MICR Code):If same as Tier I, Please Tick (✓) ☐ else, provide the details below:Savings A/c ☐ Current A/c ☐ (please refer to Sr. No. j of the instructions)

Bank A/c Number*

Bank Name*

Bank Branch*

Bank Address*

Pin Code*

Bank MICR Code

IFS code*

3. Subscriber's Nomination Details (Please refer to Sr. No. k of the instructions)Do you want to retain the same nomination as in your Tier I account? YES ☐ NO ☐

If NO, please fill in the details below (You can nominate up to a maximum of 3 nominees and if you desire so please fill Additional Nomination Form provided on Page 3.)

Nominee's Name: _____
(First Name) (Middle Name) (Last Name)

Relationship with the Nominee: _____ Date of Birth (In Case of Minor): _____ (dd/mm/yyyy)

Nominee's Guardian Details (in case of a minor) : _____
(First Name) (Middle Name) (Last Name)**4. Subscriber Scheme Preference (Please refer to Sr. No. l of the instructions for further details):**

- The maximum permitted Equity Investment in Tier II is 100% of the the total asset allocation.
- All Citizen : Selection of one PF is mandatory else form will be rejected. If no investment choice is selected, funds will be invested in Auto Choice (LC50)

Investment Option : [Please Tick (✓) in the box given below showing your investment option]

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 Mgmt. Ltd.	<input type="checkbox"/> Balanced Life Cycle Fund (BLC)			
<input type="checkbox"/> DSP Pension Fund Managers Pvt. Ltd.	<input type="checkbox"/> HDFC Pension Fund Mgmt Ltd.	OR			
<input type="checkbox"/> ICICI Prudential Pension Funds Mgmt Co Ltd.	<input type="checkbox"/> Kotak Mahindra Pension Fund Ltd.	<input type="checkbox"/> Active Choice mention the % share in applicable asset class below			
<input type="checkbox"/> LIC Pension Fund Ltd.	<input type="checkbox"/> TATA Pension Management Pvt.Ltd.	E (upto 100%)	C (Upto 100%)	G (Upto 100%)	Total
<input type="checkbox"/> SBI Pension Funds Pvt. Ltd.		% Equity	% Corp Bonds	% Govt. Sec.	100%
<input type="checkbox"/> UTI Pension Funds Ltd.		OR			
		<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"/>	(Default)

6. Declaration & Authorization

I further agree to be bound by the terms and conditions of provision of services by CRA, from time to time and any amendment thereof as approved by PFRDA, whether complete or partial without any new declaration being furnished by me.

Declaration under the Prevention of Money Laundering Act, 2002

CRA generated Acknowledgement Number (to be filled by Nodal Office): _____

<p align="center">To be filled by Nodal Office (PAO/DTO/DTA/POP/POP-SP)</p>		
	<p align="center">Signature of Authorized Signatory</p>	
	Name : _____	Place : _____
<p align="center">Nodal Office Seal</p>	Désignation : _____	Date : _____

ADDITIONAL NOMINATION FORM

I, _____ hereby nominate the person(s) mentioned below who is/are member(s)/ of my family to receive the amount in my PRAN account under National Pension System in the event of my death.

Nominee I	Nominee I - Name	F	i	r	s	t								M	i	d	d	l	e								L	a	s	t								
	Relationship											Age		Date of Birth (in case of Minor)										D	D	/	M	M	/	Y	Y	Y	Y					
	Name of Guardian (if nominee is a minor)	F	i	r	s	t								M	i	d	d	l	e								L	a	s	t								
Nominee II	Nominee II - Name	F	i	r	s	t								M	i	d	d	l	e								L	a	s	t								
	Relationship											Age		Date of Birth (in case of Minor)										D	D	/	M	M	/	Y	Y	Y	Y					
	Name of Guardian (if nominee is a minor)	F	i	r	s	t								M	i	d	d	l	e								L	a	s	t								
Nominee III	Nominee III - Name	F	i	r	s	t								M	i	d	d	l	e								L	a	s	t								
	Relationship											Age		Date of Birth (in case of Minor)										D	D	/	M	M	/	Y	Y	Y	Y					
	Name of Guardian (if nominee is a minor)	F	i	r	s	t								M	i	d	d	l	e								L	a	s	t								

Signature/Thumb Impression* of the Subscriber

Date:

d	d	m	m	y	y	y	y
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Place: **Acknowledgment to the Subscriber**

(To be filled by Nodal Office)

Tier II Activation:Nodal Office Registration Number: _____ PRAN:

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Name of the Subscriber: _____ Date: __/__/____ Time Stamp: _____

Receipt Number
(Mandatory for POP/POP-SP)

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1. Transaction Charges:

Rs.

2. Tax as applicable:

Rs.

3. Total Charges:

Rs.

Signature/Stamp of Nodal Office/Place

INSTRUCTIONS FOR FILLING THE FORM

- a) The form is to be filled by the Subscribers having a PRAN card and Tier I account under NPS.
- b) Form to be filled legibly in BLOCK LETTERS and in BLACK INK only. Please fill the form in legible handwriting so as to avoid errors in your application processing. Please do not overwrite. Corrections should be made by cancelling and re-writing and such corrections should be counter-signed by the applicant.
- c) Each box, wherever provided, should contain only one character (alphabet/number/punctuation mark) leaving a blank box after each word. The details marked with (*) are mandatory.
- d) **The Subscriber shall provide copy of PRAN card alongwith the application form.**
- e) Applications incomplete in any respect and/or not accompanied by required documents are liable to be rejected. The application is liable to be rejected if mandatory fields are left blank.
- f) Nodal Office# refers to PAO/DTO/DTA/POP/POP-SP.
- g) Government employees (mandatorily covered under NPS) may submit their application to their associated Nodal Office or to any POP-SP of their choice. The list of POP-SPs rendering services under NPS is available on CRA website www.npscra.nsdl.co.in.
- h) Any Indian citizen (other than government employee mandatorily covered under NPS) may submit the application only to the POP-SP through which they have registered with CRA for Tier I account.
- i) Subscribers are advised to retain the acknowledgment slip signed/ stamped by the Nodal Office where they submit the application.
- j) **Bank Details :**
- Bank details are mandatory for Tier-II else, account will not be activated. In case bank details are same as Tier I account, tick mark the corresponding option.
 - Subscriber shall provide **cancelled cheque**, the details of which should match with the details provided under Point No.2 on Page 1. Even if the bank details are same as in Tier I, the Subscriber should provide a 'cancelled cheque'.

k) Subscriber's Nomination Details

- (a) If a subscriber has family at the time of making a nomination, the nomination shall be in favor of one or more persons belonging to his/her family. Any nomination made in favour of a person not belonging to family shall be invalid; A fresh nomination shall be made by the subscriber upon marriage and any nomination made before such marriage shall be deemed to be invalid; If at the time of making a nomination the subscriber has no family, the nomination may be in favour of any person or persons but if the subscriber subsequently acquires a family, such nomination shall forthwith be deemed to be invalid and the subscriber shall make a fresh nomination in favour on one or more persons belonging to his family.

(b) Subscriber can nominate a maximum of three nominees.

(c) In case of more than one nominee, the percentage share for each nominee should be in whole numbers and must be equal to 100. If sum of percentage is not equal to 100, entire nomination will be rejected.

(c) Please refer Nomination relationship matrix provided below.

Unmarried Subscriber	Married / Widow / Widower / Divorcee Subscriber
1. Mother, 2. Father,	1. Spouse (Only for Married), 2. Son, 3. Daughter, 4. Mother, 5. Father, 6. Mother in Law (Only for Female and Transgender), 7. Father in Law (Only for Female and Transgender), 8. Daughter in Law, 9. Grandson, 10. Granddaughter
3. Please specify the relationship	

(d) The nomination exercised for Tier I shall not be automatically applicable to Tier II. A Subscriber to Tier II is required to make a fresh nomination. In case, you want to retain the same nomination as in Tier I, please select "YES" by putting tick mark in the box.

1) Subscriber Scheme Preference

Selection of Pension Fund (PF) & Investment Choice

- Balanced Life Cycle Fund : Equity Corporate Debt and G-Sec allocation is 50:30:20 until age 45 and allocation to Equity and Corporate Debt automatically reduces from 45 years to 55 years of age.
- Active choice - subscriber can actively decide his/ her allocation into Equity / Corporate Debt / G-Sec/ Alternate assets.
- Auto Choice-Equity allocation is 75% / 50% / 25% under conservative / Moderate / Aggressive choice opted by the subscriber and allocation to equity and corporate debt automatically reduces from age 35 years to 55 years.
- Asset class E-Equity and related instruments; Asset class C - Corporate debt and related instruments; Asset class G-Government Bonds and related instruments.
- Pension Fund (PF) Selection* (Select only one PF): 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.
- Please note that the total allocation across E, C and G 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.
- 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.)

Nomination Relationship Matrix (Please mention relationship as per details given below)			
Marital Status	Male	Female	Transgender
Unmarried	1. Mother 2. Father 3. Please specify the relationship if any other person	1. Mother 2. Father 3. Please specify the relationship if any other person	1. Mother 2. Father 3. Please specify the relationship if any other person
Married	1. Spouse 2. Son 3. Daughter 4. Mother 5. Father 6. Daughter in Law 7. Grandson 8. Granddaughter	1. Spouse 2. Son 3. Daughter 4. Mother 5. Father 6. Mother in Law 7. Father in Law 8. Daughter in Law 9. Grandson 10. Granddaughter	1. Spouse 2. Son 3. Daughter 4. Mother 5. Father 6. Mother in Law 7. Father in Law 8. Daughter in Law 9. Grandson 10. Granddaughter
Widow/ Widower	1. Son 2. Daughter 3. Mother 4. Father 5. Daughter in Law 6. Grandson 7. Granddaughter	1. Son 2. Daughter 3. Mother 4. Father 5. Mother in Law 6. Father in Law 7. Daughter in Law 8. Grandson 9. Granddaughter	1. Son 2. Daughter 3. Mother 4. Father 5. Mother in Law 6. Father in Law 7. Daughter in Law 8. Grandson 9. Granddaughter
Divorcee	1. Son 2. Daughter 3. Mother 4. Father 5. Daughter in Law 6. Grandson 7. Granddaughter	1. Son 2. Daughter 3. Mother 4. Father 5. Mother in Law 6. Father in Law 7. Daughter in Law 8. Grandson 9. Granddaughter	1. Son 2. Daughter 3. Mother 4. Father 5. Mother in Law 6. Father in Law 7. Daughter in Law 8. Grandson 9. Granddaughter

GENERAL INFORMATION FOR SUBSCRIBERS

- The Subscriber can obtain the status of his/her application from the CRA website or through the respective Nodal Office.
- For more information

Visit us at <http://www.npsra.nsd.co.in>

Call us at 020-6906 6906

Write to : Central Record keeping Agency, Protean eGov Technologies Limited (Formerly NSDL e-Governance Infrastructure limited).

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