

**TIER II DETAILS**

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

1. PAN card Number (Mandatory) :
2. **Subscribers 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
- Bank A/c Number
- Bank Name
- Branch Name
- Branch Address  PIN CODE
- State/U.T.  C o u n t r y
- Bank MICR Code  IFS Code

**Subscriber's Nomination Details**

If same as Tier I, Please Tick (√)  else, provide the details below. In case you desire to nominate more than one person, please fill Annexure III.

3. Name of the Nominee:

| First Name           | Middle Name          | Last Name            |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

4. Date of Birth (In case of Minor)

5. Relationship with the Nominee:

6. Nominee's Guardian Details (in case of a minor):

| First Name           | Middle Name          | Last Name            |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

**Subscriber Scheme Preference**

7. If same as Tier I, Please Tick (√)  else, provide the details below

(i) **PENSION FUND SELECTION (Tier II) : Please read below conditions before opting for the choice of Pension Funds:**

\* Name of the Pension Funds are given in alphabetical order.

| Name of the Pension Fund (Please select only one)         | Please Tick (√) Only One |
|---|--------------------------|
| Birla Sunlife Pension Management Limited                  | <input type="checkbox"/> |
| HDFC Pension Management Company 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"/> |
| Reliance Capital Pension Fund Limited                     | <input type="checkbox"/> |
| SBI Pension Funds Private Limited                         | <input type="checkbox"/> |
| UTI Retirement Solutions Limited                          | <input type="checkbox"/> |

\* Selection of Pension Fund is mandatory both in Active and Auto Choice.

(ii) **INVESTMENT OPTION**

(Please Tick (√) in the box given below showing your investment option).

Active Choice  Auto Choice

Please note:

- In case you select Active Choice fill up section (iii) below and if you select Auto Choice fill up section (iv) below.
- In case you do not indicate any investment option, your funds will be invested in Auto Choice (LC 50).
- 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).

**(iii) ASSET ALLOCATION (to be filled up only in case you have selected the 'Active Choice' investment option)**

| Asset Class | E<br>(Cannot exceed 50%) | C<br>(Max up to 100%) | G<br>(Max up to 100%) | Total | <b>Note:</b> 1. 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.<br>2. Asset class E-Equity and related instruments; Asset class C-Corporate debt and related instruments; Asset class G-Government Bonds and related instruments. |
|-------------|--------------------------|-----------------------|-----------------------|-------|--|
| 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, your funds will be invested as per LC 50.**

| Life Cycle (LC)Funds | Please Tick (√) Only One | <b>Note:</b> 1. LC 75- It is the Life cycle fund where the Cap to Equity investments is 75% of the total asset<br>2. LC 50- It is the Life cycle fund where the Cap to Equity investments is 50% of the total asset<br>3. LC 25- It is the Life cycle fund where the Cap to Equity investments is 25% of the total asset |
|----------------------|--------------------------|--|
| LC 75                |                          |  |
| LC 50                |                          |  |
| LC 25                |                          |  |

**Declaration & Authorization by subscriber**

I have read and understood the terms and conditions of the National Pension System and hereby agree to the same and declare that the information and documents furnished by me are true and correct, to the best of my knowledge and belief. I undertake to inform immediately the National Pension System Trust, of any change in the above information furnished by me. I do not hold any pre-existing account under NPS. I understand that I shall be fully liable for submission of any false or incorrect information or documents.

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. I shall be bound by the terms and conditions for the usage of I-pin (to access CRA/NPSCAN and view details) & T-pin on the CRA website.

**Declaration under the Prevention of Money Laundering Act, 2002**

I hereby declare that the contribution paid by me/on my behalf has been derived from legally declared and assessed sources of income. I understand that NPS Trust has the right to peruse my financial profile or share the information, with other government authorities. I further agree that NPS Trust has the right to close my PRAN in case I am found violating the provisions of any law relating to prevention of money laundering.

Date:

Place:

**Signature/Thumb Impression\* of  
Subscriber in black ink  
(\* LTI in case of male and RTI in case of female)**

**To be filled by POP/POP – SP/Nodal Office**

POP-SP/Nodal Office Registration Number

Copy of PAN Card Submitted YES  NO

|                          |                                   |  |
|--------------------------|-----------------------------------|--|
|                          | Name:                             |  |
|                          | Designation:                      |  |
|                          | Place:                            |  |
| POP-SP/Nodal Office Seal | Signature of Authorised Signatory | Date <input type="text"/> <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |