Annexure GoS-S3 (Ver 1.4)		Page 1		
Request for Scheme Preference Change under N		tem (NPS)		
NSDL e-Governance Infrastruct (Please fill all the details in CAPITAL LETTERS &				
For Nodal Office <sup>#</sup> use: Nodal Office Registration No. :	·			
Receipt No.:  (Mandatory for POP/POP-SP)  Receipt Date:/				
PRAN *: Name of the Subscriber *:  Scheme Preference Change: Tier I				
I. Default Pension Funds (PFs):				
The following Pension Funds (PFs) will act jointly as default PFs: (a) LIC Pension Fund Limited (b) SBI Pension Funds Pvt. Limited (c) UTI Retin	rement Solutions Ltd.			
II. Subscriber Scheme Choice				
In case of Central Autonomous Bodies (CAB)/ State Government (SG)/State Autonomous is allowed only if choice to employees is notified by the respective State Govt/Ministry.	is Bodies (SAB) employees,	selection made under this section		
(i). PENSION FUND SELECTION:				
PFM Name (Please select only one)	Please Tick (√) only one			
Birla Sunlife Pension Management Limited				
HDFC Pension Management Company Limited				
ICICI Prudential Pension Funds Management Company Limited				
Kotak Mahindra Pension Fund Limited				
LIC Pension Fund Limited				
SBI Pension Funds Private Limited				
UTI Retirement Solutions Limited				
* Selection of 01 Pension Fund is mandatory				
(ii). INVESTMENT OPTION [Please Tick ( $$ ) in the box given below showing your investment Choice].	nent option. Please tick only	one, either Active Choice or Auto		
1. ACTIVE CHOICE				
Asset Class G  Please Tick ( $$ )  Please Tick ( $$ )  Note:  1. Asset class G-100% of contribution will be invested in Government Bonds and related instruments  2. In case of Government employee/subscriber the Active choice of Asset Allocation is restricted to Asset Class 'G' only				
2. AUTO CHOICE				
Life Cycle (LC) Funds  Cy Only One  LC50  LC25  Please Tick (√) Only One  1. Govt. employee can exercise Auto Choice of As 2. LC 50- It is the Life cycle fund where the Cap to 3. LC 25- It is the Life cycle fund where the Cap to	o Equity investments is 50%	of the total asset		
CRA generated Acknowledgement Number (to be filled by Nodal Office):				
I, the applicant, do hereby d	leclare that			
Information stated above is true to the best of my information & belief.				
Date :  D D M M Y Y Y Y		Signature/ Thumb Impression of the Subscriber		

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<b>Scheme Preference Change:</b>	Tier II				
(i). PENSION FUND SELECTION:			ı		
PFM Name (Please select only one)			Please Tick ( $$ ) only one	2	
Birla Sunlife Pension Management Limited					
HDFC Pension Management Company Limited					
ICICI Prudential Pension Funds Management Company Limited					
Kotak Mahindra Pension Fund Limited					
LIC Pension Fund Limited					
SBI Pension Funds Private Limited					
UTI Retirement Solutions Limited					
(ii). Investment Option :(Please Tic	() in the box	given below s	showing	g your investment option	<u>)</u>
Active Choice Auto Ch	pice				
In case you select Active Choice fill up 2. In case you do not indicate any investra 3. In case you have opted for Auto Choice investment will be made as per Auto Compared to the compar	ent option, your function of the cand fill up section on the cand (LC 50).  (to be filled up  G	ds will be investe (iii) below relatin	you hav  Asset	o Choice (LC 50) of Allocation, the Asset Allocation of Selected the 'Active Ch	noice' investment option) ments; Asset class C-Corporate debt
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 in <b>Annexure A</b> . The tapering off of equity allocation will be carried out as per the matrix on date of birth.  3. 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.					
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 On LC75 LC50 LC25	Note:1. LC 75	Note:1. LC 75- It is the Life cycle 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			
CRA generated Acknowledgement Numb	er (to be filled by I	Nodal Office):			-
I Information stated above is true to the best of	ny information & be	lief.	e applican	nt, do hereby declare that	
Date : D D M M Y Y	YY				Signature/ Thumb Impression of the Subscriber

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TO BE FILLED/ATTESTED BY DDO (Mandatory if the request is processed by the associated Nodal Office)				
Rubber Stamp of the DDO	Signature of the DDO Name : Designation:			
TO BE FILLED/ATTESTED BY NODAL OFFICE				
Rubber Stamp of the Nodal Office	Signature of the Nodal Office (PAO/DTO/DTA/POP/POP-SP) Name : Designation:			
Acknowledgement to the Subscriber (To be filled by Nodal Office)				
Scheme Preference Change: Tier I Tie	r II			
Nodal Office Registration Number: PRAN:				
Name of the Subscriber:	Date:// Time Stamp:			
Receipt Number (Mandatory for POP/POP-SP)				
1. POP Transaction Charges: Rs.	2. Tax as applicable: Rs.			
3. Total Charges: Rs.				
	Signature/Stamp of Nodal Office	ce/Place		

## **Instructions for filling the Form**

- The Government Subscribers shall use this form for Scheme Preference Change for Tier I and Tier II account.
- Nodal Office# refers to PAO/DTO/DTA or a POP/POP-SP.
- All fields mark with (\*) are mandatory. All Dates should be in DDMMYYYY Format.
- For Tier I, the Subscribers shall submit the application to associated Nodal Office only.
- For Tier II, the Subscribers shall submit the application to associated Nodal Office or POP.
- For more details on scheme preference change, you may visit CRA website (www.npscra.nsdl.co.in).

## **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.
- 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.