

**Request for Scheme Preference Change**

(Please fill all the details in CAPITAL LETTERS &amp; in BLACK INK only.)



For POP-SP use: POP-SP Registration No. : \_\_\_\_\_

Receipt No.:

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Receipt Date: \_\_/\_\_/\_\_

PRAN\*

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Name of the Subscriber \*: \_\_\_\_\_

I. Scheme Preference Change : Tier I  Tier II II. Investment Option: Active Choice  Auto Choice 

Selection of Pension Fund is mandatory both in Active and Auto Choice. In case you select Active Choice fill up **Section (III)** below and if you select Auto Choice fill up **Section (IV)** on page 2.

III. Active Choice : 

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

PFM Name	Please Tick (✓)	Asset Class (Specify %)			
		Total allocation across E, C, G and A asset classes must be equal to 100%			
		E (Tier I- Cannot exceed 75) (Tier II- Max upto 100%)	C (Max upto 100%)	G (Max upto 100%)	A# (Cannot exceed 5%)
Aditya Birla Sunlife Pension Management Limited	<input type="checkbox"/>				
Axis Pension Fund 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"/>				
Max Life Pension Fund Management Limited	<input type="checkbox"/>				
SBI Pension Funds Private Limited	<input type="checkbox"/>				
TATA Pension Management Limited	<input type="checkbox"/>				
UTI Retirement Solutions Limited	<input type="checkbox"/>				

Please note:

- 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.
- # Option to Asset Class- A is available only for Tier I. In case, you have filled up Asset Class- A for Tier II, application shall be summarily rejected.
- Subscriber can select different PFM for different asset class. However, for asset class A, PFM should be any one from the selected asset class only. For example:
  - Subscriber can select PFM 'X' for asset class E, PFM 'Y' for asset class C and PFM 'Z' for asset class G. In such case, PFM for asset class A must be from PFM 'X' or 'Y' or 'Z' only.
  - Subscriber can select PFM 'X' for asset class E & G and PFM 'Y' for asset class C. In such case, PFM for asset class A must be PFM 'X' or 'Y' only.

IV. Auto Choice: 

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

PFM Name (Please select only one)	Please Tick (✓) only one
Aditya Birla Sunlife Pension Management Limited	<input type="checkbox"/>
Axis Pension Fund 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"/>
Max Life Pension Fund Management Limited	<input type="checkbox"/>
SBI Pension Funds Private Limited	<input type="checkbox"/>
TATA Pension Management Limited	<input type="checkbox"/>
UTI Retirement Solutions Limited	<input type="checkbox"/>

Life Cycle (LC) Funds	Please Tick (✓) Only One	Note :
LC75	<input type="checkbox"/>	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
LC50	<input type="checkbox"/>	
LC25	<input type="checkbox"/>	

CRA generated Acknowledgement Number (To be filed by POP-SP):

	For POP/POP-SP use:	POP/POP-SP Stamp:
Subscriber's Signature/ Thumb Impression	Name & Signature	

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**Acknowledgement to the Subscriber**  
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(To be filled by POP/POP-SP)

**Scheme Preference change:**  Tier I  Tier II
POP-SP Registration Number: \_\_\_\_\_ PRAN: 

Name of the Subscriber: \_\_\_\_\_ Date: \_\_/\_\_/\_\_\_\_ Time Stamp: \_\_\_\_\_

 Receipt Number  
 (To be provided by POP/POP-SP) 
1. POP Transaction Charges:  Rs.2. Tax as applicable:  Rs.3. Total Charges:  Rs.
  
 Signature/Stamp of POP/POP-SP/Place
**Instruction for filling the Form:**

- All fields mark with (\*) are mandatory. All Dates should be in DDMMYYYY Format.
- The Subscribers shall submit the application to POP-SP through which they have registered with CRA.
- Separate forms to be submitted for Tier I and Tier II
- For more information on scheme preference, Active Choice/ Auto Choice, please refer scheme information available on [www.camsnps.com](http://www.camsnps.com) or PFRDA website [www.pfrda.org.in](http://www.pfrda.org.in).