

NATIONAL PENSION SYSTEM (NPS) - SUBSCRIBER REGISTRATION FORM - Private Sector

How did you hear about NPS Friend/family Social media Newspaper/magazines TV / Radio Financial advisor /apps Employer

PRAN Card & Kit* i. PRAN Card (please tick(v)) ii. Account Opening Kit (please tick(v))
 (refer sl no.1 of instructions) ePRAN Card Physical PRAN Card Through Email Physical Kit (Courier)

Print my PRAN in Hindi YES NO If Yes, please submit details as per Annexure I

Please select your category* Corporate All Citizen

Paste recent passport size photograph (3.5 cm x 2.5 cm size)

Do not sign across
Do not staple / clip

To
National Pension System Trust
Dear Sir/Madam,

I hereby request that an NPS account be opened in my name as per the particulars given below:

* indicates mandatory fields. Please fill the form in English and BLOCK letters (Refer general guidelines at instructions page).

CKYC Identifier RA Code

1. PERSONAL DETAILS: (Refer Sr. No. 1 of the instructions) Use Annexure II if name exceeds the space provided below

Salutation* Shri Smt. Kumari

Applicant Name* F i r s t M i d d l e L a s t

Father's Name F i r s t M i d d l e L a s t

Mother's Name F i r s t M i d d l e L a s t

Either Father's or Mother's name is mandatory* **Select the name to appear on PRAN Card** Father's Name Mother's Name

Date of Birth* d d m m y y y y

Place of Birth*

Country of Birth*

Gender* Male Female Transgender Nationality*

Marital Status* Unmarried Married Widow/Widower Divorcee

Spouse Name* (if married) F i r s t M i d d l e L a s t

PAN Card* or Form 60 furnished Submission of PAN or Form 60 is mandatory

Annual Income Range* Below 1 lac 1 lac to 5 lac 5 lac to 10 lac 10 lac to 25 lac 25 lac to 1 Cr Above 1 Cr

Occupation Details* Public Sector Private Sector Professional Self Employed Homemaker Others

Please Tick If Applicable Politically exposed person Related to Politically exposed person (Please refer instruction no. 1)

2. PROOF OF IDENTITY AND ADDRESS* (Refer Sr. No. 2 of the instructions)

Passport Passport Expiry Date d d m m y y y y

Driving License Driving License Expiry Date d d m m y y y y

Voter ID Card Proof of possession of Aadhaar Provide last four digits

NREGA Job Card

National Population Register PoP Certificate (refer section 12)

3. CURRENT ADDRESS DETAILS* (Proof to be submitted Refer Sr. No. 3 of the instructions)

Line 1

Line 2 V i l l a g e / C i t y

District State/U.T.

Country PIN Code

4. CONTACT DETAILS*

Mobile* 9 1 Telephone with STD code)

Email ID*

5. BANK DETAILS* (Proof to be submitted - Refer Sr no. 4 of the instructions)

Account Type Saving A/c Current A/c

Bank A/c Number

Bank Name IFS Code

6. NOMINATION DETAILS* (Refer Sr no. 5 of the instructions)

A. The nomination shall be in favor of one or more persons belonging to his/her family. For nominating more than one person, submit Annexure III

B. A fresh nomination shall be made by the subscriber on his/her marriage.

Nominee 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 F i r s t M i d d l e L a s t

(if nominee is a minor)

7. SELECTION OF PENSION FUND (PF) AND INVESTMENT CHOICE* (Refer Sr no. 6 of the instructions)

1. 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 (LC 50).

2. Corporate Model: The PF / Investment Choice may be exercised in consultation with your Employer.

Pension Fund* (Please Tick (v) one)		Investment Choice (Please Tick (v) 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 Mgmt. Co 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 each asset class below					
<input type="checkbox"/> LIC Pension Fund Ltd.	<input type="checkbox"/> MAX Life Pension Mgmt. Ltd.	E (Upto75%)	C (Upto 100%)	G (Upto 100%)	A (Upto 5%)	Total	
<input type="checkbox"/> SBI Pension Funds Private Ltd.	<input type="checkbox"/> Tata Pension Management Ltd.	% Equity	% Corp Bonds	% Govt Sec	% Alt Assets	100%	
<input type="checkbox"/> UTI Retirement Solutions 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"/>

8. Activate my Tier- II account (Please tick (v) to activate) - refer Sr no 8 of instructions Providing PAN is mandatory

with the same bank, nominee & invetsment details with different bank/nominee/investment details as per Annexure IV



General Guidelines

- (a) Please fill in legible handwriting to avoid errors. Do not overwrite. Corrections should be countersigned by the applicant. Applications incomplete in any aspect (or) if mandatory fields are left blank (or) with unclear photograph (or) not accompanied by required documents (or) not authenticated by PoP/PoP-SP are liable to be rejected.
- (b) Copies of documents submitted by the applicant should be self-attested.
- (c) Applicant is advised to retain the acknowledgement slip signed/ stamped by the PoP/PoP-SP office.

SI	Item No	Item Details	Instructions																								
		Option for PRAN Card and Kit	<p>In case a subscriber opts not to have a physical PRAN Card or Welcome Kit, reduced account opening charges of CRA are applicable as under:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">Account opening with Physical PRAN card (in Rs.)</th> <th style="width: 50%;">Account opening with ePRAN card (in Rs.)</th> </tr> </thead> <tbody> <tr> <td align="center">₹ 39.36 (Excludes Applicable Charges)</td> <td align="center">Welcome kit sent vide email only ₹ 18.00 (Excludes Applicable Charges)</td> </tr> </tbody> </table>	Account opening with Physical PRAN card (in Rs.)	Account opening with ePRAN card (in Rs.)	₹ 39.36 (Excludes Applicable Charges)	Welcome kit sent vide email only ₹ 18.00 (Excludes Applicable Charges)																				
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1	1	Father's Name, Mother's Name	(a) If the name has more than 30 digits, fill Annexure II for the same. (b) If the applicant is an Orphan, he/she may leave the fields blank. However, an official document to support the status to be submitted.																								
		Politically Exposed Person	Politically Exposed Persons' (PEPs) are individuals who are or have been entrusted with prominent public functions such as heads of state or of the government, senior politicians, senior government, judicial or military officials, senior executives of state-owned corporations, important political party officials.																								
2	2	Proof of Identity and Address	If the applicant is submitting Aadhaar as proof of Identity and Address, the first 8 digits of the Aadhaar number should be redacted / masked on the submitted copy																								
3	3	Current Address	Providing current address is mandatory. The submitted address proof should contain the current address as provided in the form.																								
4	5	Bank Details	For Tier I & Tier II account, bank details and documentary proof are mandatory. Please submit a cancelled cheque / copy of bank passbook / bank statement / bank certificate / letter from Bank containing applicant's Name, Bank Name, Bank Account Number and IFS Code.																								
5	6	Nomination Details	<p>(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 favor 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 of one or more persons belonging to his family.</p> <p>(b) Please mention relationship as per "Nomination relationship matrix" provided below:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">Unmarried Subscriber</th> <th style="width: 50%;">Married / Widow/ Widower / Divorcee Subscriber</th> </tr> </thead> <tbody> <tr> <td>1. Mother, 2. Father, 3. Please specify the relationship</td> <td>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</td> </tr> </tbody> </table> <p>(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.</p>	Unmarried Subscriber	Married / Widow/ Widower / Divorcee Subscriber	1. Mother, 2. Father, 3. Please specify the relationship	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																				
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6	7	Selection of Pension Fund (PF) & Investment Choice	<p>(1) Corporate applicants may exercise these choices if the option is extended to them by the employer or else may be ignored. The Asset classwise exposure limits that will now be applicable to subscribers under Tier I and Tier II are tabulated below:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2">TIER - I</th> <th colspan="2">TIER - II</th> </tr> <tr> <th>ASSET CLASS</th> <th>MAX. LIMIT</th> <th>ASSET CLASS</th> <th>MAX. LIMIT</th> </tr> </thead> <tbody> <tr> <td>ASSET CLASS G (GOVERNMENT SECURITIES)</td> <td align="center">100%</td> <td>ASSET CLASS G (GOVERNMENT SECURITIES)</td> <td align="center">100%</td> </tr> <tr> <td>ASSET CLASS C(CORPORATE BONDS)</td> <td align="center">100%</td> <td>ASSET CLASS C(CORPORATE BONDS)</td> <td align="center">100%</td> </tr> <tr> <td>ASSET CLASS E(EQUITY)</td> <td align="center">75%</td> <td>ASSET CLASS E(EQUITY)</td> <td align="center">100%</td> </tr> <tr> <td>ASSET CLASS A(ALTERNATE ASSETS)</td> <td align="center">5%</td> <td></td> <td></td> </tr> </tbody> </table> <p>(2a) 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. (2b) Active Choice - Subscriber can actively decide his / her allocation into Equity / Corporate Debt / G-Sec / Alternate assets. (2c) 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.</p>	TIER - I		TIER - II		ASSET CLASS	MAX. LIMIT	ASSET CLASS	MAX. LIMIT	ASSET CLASS G (GOVERNMENT SECURITIES)	100%	ASSET CLASS G (GOVERNMENT SECURITIES)	100%	ASSET CLASS C(CORPORATE BONDS)	100%	ASSET CLASS C(CORPORATE BONDS)	100%	ASSET CLASS E(EQUITY)	75%	ASSET CLASS E(EQUITY)	100%	ASSET CLASS A(ALTERNATE ASSETS)	5%		
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7	9	FATCA & CRS Declaration	<p>Clarification / Guidelines on filling details if applicant residence for tax purposes in jurisdiction(s) outside India:</p> <ul style="list-style-type: none"> Jurisdiction(s) of Tax Residence: Since US taxes the global income of its citizen, every US citizen of whatever nationality, is also a resident for tax purpose in USA. Tax identification Number (TIN): TIN need not be reported if it has not been issued by the jurisdiction. However, if the said jurisdiction has issued a high integrity number with an equivalent level of identification (a "Functional equivalent"), the same may be reported. Examples of that type of number for individual include, a social security/insurance number, citizen/personal identification/services code/number and resident registration number) In case applicant is declaring US person status as 'No' but his/her Country of Birth is US, document evidencing Relinquishment of Citizenship should be provided or reasons for not having relinquishment certificate is to be provided. In case applicant is declaring US person status as 'Yes', provide PAN and 'father name' in addition to details required under section 9 of form 																								
8	8	Tier-II activation	Asset Class A is not available under Tier-II. In case Subscriber has selected to activate Tier-II Account with Same Bank, Nominee and Investment details that of Tier-I whereas he/she has chosen allocation in Asset Class A for Tier-I account, the applicant would be required to submit the Annexure IV for Tier II mentioning the asset allocations																								
9	9 & 10	Declaration / Signature by Applicant	In case the applicant is unable to affix signature, Left Thumb Impression in case of male and Right Thumb Impression in case of female should be affixed and in case there is no hands, toe impression of the applicant to be provided. The thumb / toe impression should be attested by two persons, one of whom should be the authorised official of PoP attesting the same under his/her official seal and stamp.																								

Nomination Relationship Matrix (Please mention relationship as per details given below)

Relationship	Male				Female				Transgender			
	Unmarried	Married	Widower	Divorcee	Unmarried	Married	Widower	Divorcee	Unmarried	Married	Widower/Widow	Divorcee
Father	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Mother	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Son		Yes	Yes	Yes		Yes	Yes	Yes		Yes	Yes	Yes
Daughter		Yes	Yes	Yes		Yes	Yes	Yes		Yes	Yes	Yes
Husband						Yes				Yes (spouse)		
Wife		Yes										
Father In Law						Yes	Yes			Yes	Yes	Yes
Mother In Law						Yes	Yes			Yes	Yes	Yes
Grand Son		Yes	Yes (only if the Married SON is expired)	Yes		Yes	Yes (only if the Married SON is expired)	Yes		Yes	Yes (only if the Married SON is expired)	Yes
Grand Daughter		Yes		Yes		Yes		Yes		Yes		Yes
Daughter In Law		Yes		Yes		Yes		Yes		Yes		Yes
Others	Yes		Yes	Yes	Yes		Yes	Yes	Yes		Yes	Yes

Applicable CRA charges:	KFintech (Rs.)
Account Opening charges	₹ 39.36
Account Maintenance Charges (p.a.)	₹ 57.63
Charge per transaction	₹ 3.36

Annexures - Subscriber Registration Form for Private Sector applicants (Tick and fill applicable annexures below)

Annexure I - PRAN Card हिंदी में भरने हेतु

आवेदक का नाम	_____
मध्यनाम	_____
उपनाम	_____
पिता / माता का नाम	_____
मध्यनाम	_____
उपनाम	_____

Annexure II - If characters of name exceeded the space provided on page 1 of the application form

Applicant's First Name	
Middle Name	
Last Name	
Father's First Name	
Middle Name	
Last Name	
Mother's First Name	
Middle Name	
Last Name	

Annexure II I- Additional Nomination For Tier-I For Tier-II For both Tier-I & Tier-II

Percentage Share	Nominee I	Nominee II	Nominee III	Total should be equal to 100%
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

Annexure IV - Activate Tier-II (with Different Bank/Nomination/Investment Details - tick and fill as applicable)

PAN* _____ Copy of PAN to be attached

No change in Bank details **Bank details for Tier-II are as under:**

Account Type Saving A/c Current A/c

Bank A/c Number _____

Bank Name _____ IFS Code _____

No change in Nominee details **Nominee details for Tier-II are as under:**

Nominee 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

In case you desire to nominate more than one person, fill Annexure III above

No change in Investment details **Investment details for Tier-II are as under:**

Pension Fund* (Please Tick (v) one)		Investment Choice (Please Tick (v) 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 Mgmt. Co 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 each asset class below			
<input type="checkbox"/> LIC Pension Fund Ltd.	<input type="checkbox"/> MAX Life Pension Mgmt. Ltd.	E (Upto 100%)	C (Upto 100%)	G (Upto 100%)	Total
<input type="checkbox"/> SBI Pension Funds Private Ltd.	<input type="checkbox"/> Tata Pension Management Ltd.	% Equity	% Corp Bonds	% Govt Sec	100%
<input type="checkbox"/> UTI Retirement Solutions Ltd.		OR			
		<input type="checkbox"/> Auto Choice Select one life cycle fund below			
		Conservative (LC25)	Moderate (LC50)	Aggressive (LC75)	

Name of the Applicant	_____	Signature / Thumb Impression* of Applicant (refer instructions)
Place	_____	
Date	D/ D/ M/M/ Y/ Y/ Y/ Y/	