Annexure UOS-S3 Page 1	
Request for Scheme Preference Change and/or Switch (Please fill all the details in CAPITAL LETTERS & in BLACK INK only.)	
For POP-SP use:  POP-SP Registration No.:	
Receipt No.:	Receipt Date ://
PRAN *: Name of the Subscriber *:	
Scheme Preference Change and/or switch:   Tier I  Tier II	
(i). 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.  *Name of the Pension Funds are given in alphabetical order.	
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	
Reliance Capital Pension Fund Limited	
SBI Pension Funds Private Limited	
UTI Retirement Solutions Limited	
(ii). Investment Option Active Choice Auto Choice  Auto Choice  (iii). Asset Allocation (to be filled up only in case you have selected the 'Active Choice' investment option)  Asset Class  E  CRA generated Acknowledgement Number (to be	
Asset Class (Cannot exceed 50%) C G Total CRA generate filled by POP-	
70 Share	
For POP/POP-SP use: PO	P/POP-SP Stamp:
Subscriber's Signature/ Thumb Impression  Name & Signature	
(Perforation) - Acknowledgement to the Subscriber	
(To be filled by POP/POP-SP)  Scheme Preference change/switch:  Tier I  Tier II	
POP-SP Registration Number: PRAN: Properties of the Subscriber.	
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/S	tamp 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.
- For more details on switch of scheme, you may visit CRA website (www.npscra.nsdl.co.in).
- Separate forms to be submitted for Tier I and Tier II

## Subscriber Scheme Preference and/or switch

## **Active choice**

- 1. PFM selection is mandatory. The form shall be rejected if a PFM is not opted for.
- 2. Allocation under Equity (E) cannot exceed 50%
- 3. A Subscriber opting for active choice may select the available asset classes ("E", "G", & "C"). However, the sum of percentage allocation across all the selected asset classes must equal 100. If the sum of percentage allocations is not equal to 100%, or the asset allocation table is left blank, the application shall be rejected.

## Auto choice

- 4. A Subscriber opting for Auto Choice must also select a PFM. The application shall be rejected if the Subscriber does not indicate his/her choice of PFM.
- 5. In case of Auto Choice, DO NOT fill up section for Asset Allocation. In case you do, the Asset Allocation instructions will be ignored and investment will be made as per Auto Choice.

In case both the investment option and the asset allocation are left blank, the Subscriber's funds will be invested as per Auto Choice