

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* (refer sl no.1 of instructions)

i. PRAN Card (please tick(v)) ePRAN Card Physical PRAN Card Through Email Physical Kit (Courier)

ii. Account Opening Kit (please tick(v)) 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 × 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 PoP Certificate (refer section 12)

National Population Register

3. CURRENT ADDRESS DETAILS* (Proof to be submitted)

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. 3 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. 4 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. 5 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"/> Balanced Life Cycle Fund (BLC)
<input type="checkbox"/> DSP Pension Fund Managers Pvt Ltd	OR
<input type="checkbox"/> ICICI Prudential Pension Funds Mgmt Co Ltd	<input type="checkbox"/> Active Choice mention the % share in each asset class below
<input type="checkbox"/> LIC Pension Fund Ltd	E (Upto75%) C (Upto 100%) G (Upto 100%) A (Upto 5%) Total
<input type="checkbox"/> SBI Pension Funds Pvt Ltd	% Equity % Corp Bonds % Govt Sec % Alt Assets 100%
<input type="checkbox"/> UTI Retirement Solutions Ltd	OR
<input type="checkbox"/> Axis Pension Fund Mgmt Ltd	<input type="checkbox"/> Auto Choice select one life cycle fund below
<input type="checkbox"/> HDFC Pension Mgmt Co Ltd	Conservative (LC25) <input type="checkbox"/> Moderate (LC50) <input type="checkbox"/> Aggressive (LC75) <input type="checkbox"/>
<input type="checkbox"/> Kotak Mahindra Pension Fund Ltd	
<input type="checkbox"/> Max Life Pension Fund Mgmt Ltd	
<input type="checkbox"/> Tata Pension Mgmt Pvt Ltd	
<input type="checkbox"/> Any other (please mention)	

8. Activate my Tier- II account (Please tick (v) to activate) - refer Sr no 7 of instructions

Providing PAN is mandatory

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

9. FATCA* (Foreign Account Tax Compliance Act) & CRS DECLARATION (Refer Sr no. 6 of the instructions):

I am a tax resident of India and not resident of any other country I am a tax resident of the country/ies mentioned below
 US Person Yes No

Particulars	Country (1)	Country (2)	Country (3)
Country/countries of Tax Residency			
Address in the jurisdiction for Tax Residence	Address Line 1		
	City/Town/Village		
	State		
	ZIP/Post Code		
Tax Identification Number (TIN)/Functional equivalent Number			
TIN/ Functional equivalent Number Issuing Country			
Validity of documentary evidence provided (Wherever applicable)	ddmmyyyy	ddmmyyyy	ddmmyyyy

I have understood the information requirements of this Form (read along with the FATCA/CRS Instructions and Terms & Conditions) and hereby confirm that the information provided by me/us on this Form is true, correct, and complete and hereby accept the same.

Signature / Thumb Impression* of Applicant
(refer instructions)

10. DECLARATION BY APPLICANT* (Refer Sr no. 7 of the instructions)

I have read and understood the terms and conditions of the National Pension System. The information and documents furnished by me are true and correct, to the best of my knowledge. Any changes in the information furnished by me shall be informed to CRA / NPS Trust. 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.

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 Applicant
(*LTI in case of males and RTI in case of females to be provided. Toe impression in case no hands)

11. DECLARATION BY EMPLOYER (All Details are Mandatory)

Date of Retirement
 Employee Code/ID Non-mandatory if not available
 CHO Registration Number CBO Registration Number

It is certified that _____ is employed with us and the details provided in this subscriber registration form including the address and employment details provided above are as per the service record of the employee maintained with us. It is further certified that he/she has read entries/entries have been read over to him/her by us and got confirmed by him/her.

Name of the Authorised Person
 Designation of the Authorised Person
 Date
 Place

Signature of Authorised person Rubber Stamp of the Employer

12. TO BE FILLED BY POP

Receipt No. (17 digits)
 POP Registration Number POP-SP Registration Number
 Documents Received:

Existing Customer: I/we hereby certify/confirm that Shri/Smt/Kum is an existing KYC verified customer. The above applicant is having an operative Bank/ Demat/ Folio/ account (specify nature of the account) having account number /client ID..... maintained at branch/office. The KYC documents available with us for this customer/client matches the requirement for opening NPS account and are in compliance with PMLA Rules. I/We further confirm that the Savings Bank a/c of Sh/Smt/Kum is not a 'Basic Savings Bank Deposit Account (applicable in case of Bank PoP)

Name of the Authorised Person
 Designation of the Authorised Person
 Date
 Place

Signature of Authorised person Rubber Stamp of the PoP

ACKNOWLEDGEMENT

Name of the Subscriber:
 Application Receipt Date:
 Initial contribution amount ₹
 Mode of payment Cheque / DD Debit instruction Cash

Stamp and Signature of PoP

INSTRUCTIONS FOR FILLING THE SUBSCRIBER REGISTRATION FORM

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.

Sl	Item No	Item Details	Instructions												
1	1	Option for PRAN Card and Kit	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: <table border="1"> <thead> <tr> <th colspan="2">Account opening with Physical PRAN card (in Rs.)</th> <th colspan="2">Account opening with ePRAN card (in Rs.)</th> </tr> <tr> <th colspan="2"></th> <th>Welcome kit sent in hardcopy</th> <th>Welcome kit sent vide email only</th> </tr> <tr> <th colspan="2">₹</th> <th>₹</th> <th>₹</th> </tr> </thead> </table>	Account opening with Physical PRAN card (in Rs.)		Account opening with ePRAN card (in Rs.)				Welcome kit sent in hardcopy	Welcome kit sent vide email only	₹		₹	₹
		Account opening with Physical PRAN card (in Rs.)		Account opening with ePRAN card (in Rs.)											
				Welcome kit sent in hardcopy	Welcome kit sent vide email only										
₹		₹	₹												
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	(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 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. (b) Please mention relationship as per "Nomination relationship matrix" provided below:												
			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											
			(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.												
6	7	Selection of Pension Fund (PF) & Investment Choice	(1) Corporate applicants may exercise these choices if the option is extended to them by the employer or else may be ignored. (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.												
			Clarification / Guidelines on filling details if applicant residence for tax purposes in jurisdiction(s) outside India: <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 												
			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.												

Applicable CRA charges:	NSDL	Kfintech	CAMS
Account Opening charges	₹	₹	₹
Account Maintenance Charges (p.a.)	₹	₹	₹
Charge per transaction	₹	₹	₹

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

<input type="checkbox"/>	Annexure I - PRAN Card हिंदी में प्रिंट करने हेतु
आवेदक का नाम	_____
मध्यनाम	_____
उपनाम	_____
पिता / माता का नाम	_____
मध्यनाम	_____
उपनाम	_____

<input type="checkbox"/>	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	_____

<input type="checkbox"/>	Annexure III - Additional Nomination	<input type="checkbox"/> For Tier-I	<input type="checkbox"/> For Tier-II	<input type="checkbox"/> 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 _____

<input type="checkbox"/>	Annexure IV - Activate Tier-II (with Different Bank/Nomination/Investment Details - tick and fill as applicable)
PAN*	_____ Copy of PAN to be attached
<input type="checkbox"/>	No change in Bank details
<input type="checkbox"/>	Bank details for Tier-II are as under:
Account Type	<input type="checkbox"/> Saving A/c <input type="checkbox"/> Current A/c
Bank A/c Number	_____
Bank Name	_____ IFS Code _____
<input type="checkbox"/>	No change in Nominee details
<input type="checkbox"/>	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 _____

<input type="checkbox"/>	No change in Investment details	<input type="checkbox"/>	Investment details for Tier-II are as under:
<input type="checkbox"/>		Pension Fund* (Please Tick (v) one)	
<input type="checkbox"/>		Investment Choice (Please Tick (v) one)	
<input type="checkbox"/>		Balanced Life Cycle Fund (BLC)	
<input type="checkbox"/>		Active Choice mention the % share in each asset class below	
E (Upto 100%)	C (Upto 100%)	G (Upto 100%)	Total
% Equity	% Corp Bonds	% Govt Sec	100%
<input type="checkbox"/>		Auto Choice Select one life cycle fund below	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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/		