

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

How did you hear about NPS		<input type="checkbox"/> Friend/ family	<input type="checkbox"/> Social media	<input type="checkbox"/> Newspaper/magazines	<input type="checkbox"/> TV / Radio	<input type="checkbox"/> Financial advisor /apps	<input type="checkbox"/> Employer	
PRAN Card & Kit* (refer sl no.1 of instructions)	i. PRAN Card (please tick(v))		ii. Account Opening Kit (please tick(v))					
	<input type="checkbox"/> ePRAN Card	<input type="checkbox"/> Physical PRAN Card	<input type="checkbox"/> Through Email	<input type="checkbox"/> Physical Kit (Courier)				
Print my PRAN in Hindi		<input type="checkbox"/> YES	<input type="checkbox"/> NO	If Yes, please submit details as per Annexure I				
Please select your category*		<input type="checkbox"/> Corporate	<input type="checkbox"/> All Citizen					
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).							Paste recent passport size photograph (3.5 cm × 2.5 cm size) Do not sign across Do not staple / clip	
CKYC Identifier			RA Code					
1. PERSONAL DETAILS: (Refer Sr. No. 1 of the instructions) <i>Use Annexure II if name exceeds the space provided below</i>								
Salutation*	<input type="checkbox"/> Shri <input type="checkbox"/> Smt. <input type="checkbox"/> 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					<input type="checkbox"/> Father's Name <input type="checkbox"/> Mother's Name	
Date of Birth*	d d m m y y y y							
Place of Birth*								
Country of Birth*								
Gender*	<input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> Transgender			Nationality*				
Marital Status*	<input type="checkbox"/> Unmarried <input type="checkbox"/> Married <input type="checkbox"/> Widow/Widower <input type="checkbox"/> 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 <input type="checkbox"/> Submission of PAN or Form 60 is mandatory							
Annual Income Range*	<input type="checkbox"/> Below 1 lac <input type="checkbox"/> 1 lac to 5 lac <input type="checkbox"/> 5 lac to 10 lac <input type="checkbox"/> 10 lac to 25 lac <input type="checkbox"/> 25 lac to 1 Cr <input type="checkbox"/> Above 1 Cr							
Occupation Details*	<input type="checkbox"/> Public Sector <input type="checkbox"/> Private Sector <input type="checkbox"/> Professional <input type="checkbox"/> Self Employed <input type="checkbox"/> Homemaker <input type="checkbox"/> Others							
Please Tick If Applicable		<input type="checkbox"/> Politically exposed person <input type="checkbox"/> 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						<input type="checkbox"/> 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	<input type="checkbox"/> Saving A/c <input type="checkbox"/> 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)		
Name of Guardian (if nominee is a minor)	F i r s t M i d d l e L a s t							
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"/> Active Choice mention the % share in each asset class below				
<input type="checkbox"/> DSP Pension Fund Managers Pvt Ltd				E (Upto75%) C (Upto 100%) G (Upto 100%) A (Upto 5%) Total				
<input type="checkbox"/> ICICI Prudential Pension Funds Mgmt.Co. Ltd.				% Equity % Corp Bonds % Govt Sec % Alt Assets 100%				
<input type="checkbox"/> LIC Pension Fund Ltd				OR				
<input type="checkbox"/> SBI Pension Funds Private Ltd				<input type="checkbox"/> Auto Choice select one life cycle fund below				
<input type="checkbox"/> UTI Retirement Solutions Ltd				Conservative (LC25) Moderate (LC50) Aggressive (LC75)				
8. Activate my Tier- II account (Please tick (v) to activate) - refer Sr no 7 of instructions <i>Providing PAN is mandatory</i>								
<input type="checkbox"/> with the same bank, nominee & invetsment details				<input type="checkbox"/> with different bank/nominee/investment details as per Annexure IV				

☐ 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

<p>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.</p>	<p>Signature / Thumb Impression* of Applicant (refer instructions)</p>
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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:

d	d	m	m	y	y	y	y
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 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)

Date of Retirement	d	d	m	m	y	y	y	y																		
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														
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Receipt No. (17 digits)	<input type="text"/>
POP Registration Number	<input type="text"/> POP-SP Registration Number <input type="text"/>
Documents Received:	<input type="text"/>

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		<div>Signature of Authorised person</div> <div>Rubber Stamp of the PoP</div>
Designation of the Authorised Person		
Date		
Place		

Name of the Subscriber:											
Application Receipt Date:	d	d	m	m	y	y	y	y			
Initial contribution amount	¥										
Mode of payment	<input type="checkbox"/>	Cheque / DD	<input type="checkbox"/>	Debit instruction	<input type="checkbox"/>	Cash					

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.

SI	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:																								
			Account opening with Physical PRAN card (in Rs.)	Account opening with ePRAN card (in Rs.)																							
				Welcome kit sent vide email only																							
		₹ 39.36 (Excludes Applicable Charges)	₹ 18.00 (Excludes Applicable Charges)																								
		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) 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	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: <table><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><tr><td>ASSET CLASS G (GOVERNMENT SECURITIES)</td><td>100%</td><td>ASSET CLASS G (GOVERNMENT SECURITIES)</td><td>100%</td></tr><tr><td>ASSET CLASS C(CORPORATE BONDS)</td><td>100%</td><td>ASSET CLASS C(CORPORATE BONDS)</td><td>100%</td></tr><tr><td>ASSET CLASS E(EQUITY)</td><td>75%</td><td>ASSET CLASS E(EQUITY)</td><td>100%</td></tr><tr><td>ASSET CLASS A(ALTERNATE ASSETS)</td><td>5%</td><td></td><td></td></tr></table>	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	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																								
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

KFINTECH

EXPERIENCE TRANSFORMATION

