

Instruction for filling the Form:

- a) All fields mark with (*) are mandatory. All Dates should be in DDMMYYYY Format.
- b) **Subscriber of Government sector (having Tier I account in Government sector) can submit request only for Tier II account.**
- c) The Subscribers shall submit the application to POP-SP through which they have registered with CRA along with copy of PRAN card. Subscribers under Government sector who are not IRA compliant i.e, those who have not been issued a PRAN card shall submit documents relating to proof of identity as mentioned in instruction (g)
- d) For more details on terms and conditions of switch, please refer to the Offer Document.
- e) Separate forms to be submitted for Tier I and Tier II and both shall be chargeable as a separate transaction.
- f) New Scheme preference requested by subscriber through this form will be applicable to existing holdings in the subscriber account as well as to the prospective subscriptions

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

g) **Illustrative list of documents acceptable as proof of identity**

Sr. No.	Proof of Identity (Copy of any one)
1	Passport
2	Voter’s Identity Card
3	Driving License
4	PAN Card
5	Photo Identity Card issued by Department (<i>Identity card should be valid on the date of presenting as proof</i>)

DISCLAIMER: The new scheme preference request of change in PFM / Investment Option / Asset Allocation will result in switch out of units from one or more scheme and switch-in to another. The process of switch-out of units i.e., redemption of units will be carried out on day T and then subsequently, investment will be made on day T+3. Both redemption and investment will happen on the basis of Net Asset Value (NAV) of the schemes as on that date. NAV may vary between T and T+3. Hence, variation in NAV on T and T+3 may result in gain/loss to the subscriber.