

NATIONAL PENSION SYSTEM (NPS) - SUBSCRIBER REGISTRATION FORM for NRI / OCI

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))	ii. Account Opening Kit (please tick(v))
	☐ 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 × 2.5 cm size)

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:

Do not sign across
Do not staple / clip

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

CKYC Identifier	RA Code
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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* (All fields are mandatory - Refer Sr. No. 2 of the instructions)

☐ Non-Resident Indian (please tick(v))	☐ Overseas Citizen of India (please tick(v))
Passport No	OCI Card No.
Expiry Date	Date of issue
Visa/Work Permit No.	Place of issue
Expiry Date	Foreign Passport No
Indian Address Proof	Overseas Address Proof
(Copy to be provided)	(Copy to be provided)
☐ Passport ☐ Aadhaar ☐ Driving License	☐ OCI Card ☐ Passport
☐ Voter ID ☐ NPR ☐ PoP Certificate	☐ Driving License ☐ (specify)

3.1 Current Overseas Address* (Proof for this address is mandatory for OCIs)

Line 1	State/Province
Line 2	
Line 3	
Country	ZIP/PIN

3.2 Current Indian Address* (Proof for this address is mandatory for NRIs)

Line 1	V i l l a g e / C i t y
Line 2	
District	State/U.T
Country	PIN Code

4. CONTACT DETAILS*

Mobile*	Telephone with STD code
Email ID*	

5. BANK DETAILS* (Proof to be submitted - Refer Sr no. 3 of the instructions)

Account Type	☐ NRE ☐ NRO	IFSC /SWIFT Code
Bank A/c Number		
Bank Name		

NRIs/OCIs should make contributions through NRE/NRO Account only and fund transfers should comply to regulatory requirements of RBI / Government and FEMA, as applicable.

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	Age	Date of Birth (In case of Minor)
Relationship			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		

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

8. Repatriation of corpus*		For repatriation of corpus, the contributions should be made from NRE account only	
I would like to open account on		☐ Repatriation Basis	☐ Non-repatriation Basis
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/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
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.		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)	
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: ddmmyyyy		Place:	
11. DECLARATION BY EMPLOYER (All Details are Mandatory)			
Only for Corporate Sector			
Date of Retirement	ddmmyyyy		
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		Signature of Authorised person Rubber Stamp of the Employer	
Designation			
Date			
Place			
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 PML Rules. I/We further confirm that the Bank a/c of Sh/Smt/Kum _____ is a NRE/FCNR/NRO Account (applicable in case of Bank PoP)			
Name of the Authorised Person		Signature of Authorised person Rubber Stamp of the PoP	
Designation			
Date			
Place			
ACKNOWLEDGEMENT			
Name of the Subscriber:		Stamp and Signature of PoP	
Application Receipt Date:	ddmmyyyy		
Initial contribution amount	₹		
Mode of payment	☐ Cheque / DD ☐ Debit instruction ☐ 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.						
Sl	Item No	Item Details	Instructions			
1	1	Eligibility / Applicability	(a) This Form is applicable only for Non Resident Indians (NRIs) & Overseas Citizen of India (OCIs). Foreign Nationals and Persons of Indian Origin (PIO) are not allowed to open NPS account. When an OCI comes to India with an intention to stay for an indefinite period and stays more than 182 days, he/she loses the privileges available to NRIs/OCIs and thus such OCI may open an NPS account applicable to resident Indians. (b) NRIs/OCIs are not permitted to open NPS Tier-II account			
		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 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 NRI 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	Applicant is required to provide the details of NRE/NRO account only. Bank details and documentary proof are mandatory in NPS. 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 / SWIFT 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.			
7	9	FATCA & CRS Declaration	Clarification / Guidelines on filling details if applicant residence for tax purposes in jurisdiction(s) outside India: • 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', 'father name' and PAN are mandatory alongwith details required in section 9 of form			
8	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 NRI/OCI 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 III - Additional Nomination																																	
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			p			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									
Name of the Applicant																						Signature / Thumb Impression* of Applicant (refer instructions)											
Place																																	
Date		D/ D/ M/ M/ Y/ Y/ Y/ Y/																															