

INSTRUCTIONS FOR FILLING THE FORM

- a) Form to be filled legibly in BLOCK LETTERS and in BLACK INK only. Please fill the form in legible handwriting so as to avoid errors in your application processing. Please do not overwrite. Corrections should be made by cancelling and re-writing and such corrections should be counter-signed by the applicant.
- b) Each box, wherever provided, should contain only one character (alphabet/number/punctuation mark) leaving a blank box after each word.
- c) The subscriber should affix a recent color photograph (size 3.5 cm x 2.5 cm) in the space provided on the form. The photograph should not be stapled or clipped to the form. (The clarity of image on PRAN card will depend on the quality and clarity of photograph affixed on the form.)
- d) Signature /Thumb impression (**LTI in case of males and RTI in case of females**) should only be within the box provided in the form. **The subscriber should not sign across the photograph.** If there is any mark on the photograph such that it hinders the clear visibility of the face of the subscriber, the application shall not be accepted.
- e) Applications incomplete in any respect and/or not accompanied by required documents are liable to be rejected. The application is liable to be rejected if mandatory fields are left blank.
- f) **The subscriber's thumb impression should be verified by the designated officer of the POP- SP accepting the form.**
- g) **Subscribers are advised to retain the acknowledgement slip signed/ stamped by the POP-SP where they submit the application.**

Sr. No.	Item No.	Item Details	Guidelines for Filling the Form		
Section A – Subscriber's Personal Details					
1.	1.	Full Name	Please state your name as mentioned in the Proof of Identity failing which the application is liable to be rejected. If the Proof of identity has a name by which the applicant has been known differently in the past, than the one provided in this application form, then requisite proof should be provided e.g. marriage certificate, or gazetted copy of name change.		
2.	3.	Date of Birth	Please ensure that this matches with the Date of Birth as indicated in the document provided in support.		
3	5.	Category	An NRI subscriber would need to furnish an Indian address for communication and bank details within India. Fund transfers by Non Resident Indians' would be subject to regulatory requirements as prescribed by RBI from time to time and FEMA requirements.		
4.	7.	Present Address	All future communications will be sent to present address.		
5.	9, 10, 11	Phone No., Mobile No, & Email ID	It is advisable to mention either "Telephone number" or "Mobile number" or "Email ID" so that Subscriber can be contacted in future for any discrepancy.		
6.	13	Bank Details	If subscriber mentions any of the bank details (except MICR code), all the bank details shall be mandatory.		
Illustrative list of documents acceptable as proof of identity and address					
No.	Proof of Identity (Copy of any one)		No.	Proof of Address (Copy of any one)	
1	School Leaving Certificate		1	Electricity bill^	
2	Matriculation Certificate		2	Telephone bill^	
3	Degree of Recognized Educational Institution		3	Depository Account Statement^	
4	Depository Account Statement		4	Credit Card Statement^	
5	Bank Account Statement / Passbook		5	Bank Account Statement / Passbook^	

6	Credit Card	6	Employer Certificate^
7	Water Bill	7	Rent Receipt^
8	Ration Card	8	Ration Card
9	Property Tax Assessment Order	9	Property Tax Assessment Order
10	Passport	10	Passport
11	Voter's Identity Card	11	Voter's Identity Card
12	Driving License	12	Driving License
13	PAN Card	13	Certificate of address signed by a Member of Parliament or Member of Legislative Assembly or Municipal Councilor or a Gazetted Officer.
14	Certificate of identity signed by a Member of Parliament or Member of Legislative Assembly or Municipal Councilor or a Gazetted Officer.		
<p>Note: 1) Proof of Address mentioned in Sr. No. 1 to 7 (^) should not be more than six months old on the date of application.</p> <p>2) You are required to bring original documents & two self-attested photocopies (Originals will be returned over-the-counter after verification)</p>			
Section B - Subscriber's Nomination Details			
7.	4.	Percentage Share	<p>1) Subscriber can nominate a maximum of three nominees.</p> <p>2) Subscriber cannot fill the same nominee details more than once.</p> <p>3) Percentage share value for all the nominees must be integer. Decimals/Fractional values shall not be accepted in the nomination(s).</p> <p>4) Sum of percentage share across all the nominees must be equal to 100. If sum of percentage is not equal to 100, entire nomination will be rejected.</p>
8.	5.	Nominee's Guardian Details	If a nominee is a minor, then nominee's guardian details shall be mandatory.

Section C - Subscriber Scheme Preference

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 at Section C (iii) is left blank, the application shall be rejected.**

Auto choice

1. 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
2. In case both investment option and the asset allocation at section C (ii) and C (iii) are left blank, the subscriber's funds will be invested as per Auto Choice

For more details on investment options and asset classes, please refer to the Offer Document.