



**Instruction for filling the Form:**

- All fields mark with (\*) are mandatory. All Dates should be in DDMMYYYY Format.
- The Subscribers shall submit the application to POP-SP through which they have registered with CRA.
- For more details on terms and conditions of switch, please refer to the Offer Document.
- Separate forms to be submitted for Tier I and Tier II
- **Subscriber of Government sector (having Tier I account in Government sector) can submit request only for Tier II account.**

**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**