Form 301 Page 1 **New Pension System (NPS)** Withdrawal Form for Claim of Accumulated Pension Wealth by Subscriber on attaining 60 years of age (Please fill all the details in CAPITAL LETTERS & in BLACK INK only.) Self attested photograph of the Acknowledgement Number: Date: subscriber (DD/MM/YYYY) (Generated by CRA) POP-SP Registration No.:_ POP Registration No.:_ Receipt Number issued by receiving office: Entered By: _ Verified By: Sir/Madam, I hereby submit a request for withdrawal under NPS and give below the necessary details: Section A – Subscriber's Personal Details: 1. PRAN *: 2. Full Name (As in PRAN Card) *: First Name* Middle Name Last Name 3. Father's/Spouse name*: First Name* Middle Name Last Name 4. Address*: Flat/Unit No, Block no.* Name of Premise/Building/Village Area/Locality/Taluka District/Town/City* State / Union Territory* Country* Pin Code* 5. Mobile No. 7. Email id: 6. Date of Birth*(As in PRAN Card): Section B – Subscriber's Withdrawal Details: 1. The Lump-sum amount to be withdrawn and amount to purchase annuity in case of normal withdrawal*(Please refer **General Instruction no.4)** Lump-Sum amount Amount to purchase life annuity Description Total (Maximum of 60%) (Minimum of 40%) % share 100%

| Note: A separate form NPS — AP needs to be filled in for purchase of Annuity and for arranging the mouthly peasion/annuity. The subscriber is required to follow the procedure laid down by Annuity Service Provider (ASP). 2. Type of withdrawal*: One Time Withdrawal Phased Withdrawal Phased Withdrawal Phased Withdrawal Phased Withdrawal Phased Withdrawal Phased Lump-Sum Amount Percentage of lump-sum amount to be withdrawn this year (Please refer General Instruction no.5) Description Phased Lump-Sum Amount Percentage (Minimum 10%) Phased Lump-sum amount for accumulated pension wealth in a phased manner over the period from 60 years (or any other retirement age as prescribed by employer) to 70 years. Subscriber has to withdrawal of lump-sum amount, subscriber has to withdrawal of lump-sum amount, subscriber has to withdrawal and part of 10% of the remaining pension wealth every year, at the age of 70 years, subscriber would compulsary withdraw any amount lying to held rectain the future. Por subscriber is subject to the NAV movement and may lose or gala in the future. Por subscriber is subject to the NAV movement and may lose or gala in the future. Por subscriber is phased withdrawal, the Central Recordkeeping Agency (CRA) maintenance charges would be deducted from the corpus/units lying in the account of the subscriber ection C - Subscriber's Bank Details: 1. For Electronic transfer or Direct Credit through ECS/NEFT/RTGS, Proof attached for Bank Details*: 2. Cancelled Cheque | <u>Form 301</u> | | | | | | | | | | | | | | | | | | | | P | age | 2 | |
|--|--|--|------------------------------------|------------------------------|-----------------------------------|---------------------------|--------------------------|--------------------------------|--------------|------------------------|--------------------------------|-------------------------|---------|--------------|--------------|-------------|--------------|------|--------------|--------------|---------------|--------------|---------------|---------|
| One Time Withdrawal | | | | | | | | | | | | | | | | | | | | | | | thly | y |
| 3. In case of Phased Withdrawal#, please mention the percentage of lump-sum amount to be withdrawn this year (Please refer General Instruction no.5) Description | 2. Type of wi | thdrawal*: | | | | | | | | | | | | | | | | | | | | | | |
| Description Phased Lump-Sum Amount Percentage Winimum 10% W | One Time | Withdrawal | | | Phased | l With | ndrav | val | | | | | | | | | | | | | | | | |
| Wishare Wish | | | | | nention tl | ne pei | rcent | age o | of lu | mp- | sum a | amou | ınt t | o be | wit | hdr | awn | this | s yea | ar (F | Plea | se | | |
| Note: In phased withdrawal of lump-sum amount, subscriber can opt to withdraw lump-sum amount for accumulated pension wealth in a phased manner over the period from 60 years (or any other retirement age as prescribed by employer) to 70 years. Subscriber has to withdraw any amount lying to their credit. Also, note that in phased withdrawal of lump-sum amount, subscriber is subject to the NAV movement and may lose or gain in the future. For subscriber opting for phased withdrawal, the Central Recordkeeping Agency (CRA) maintenance charges would be deducted from the corpus/units lying in the account of the subscriber ection C – Subscriber's Bank Details: 1. For Electronic transfer or Direct Credit through ECS/NEFT/RTGS, Proof attached for Bank Details*: 2. Cancelled Cheque | | Description | n | Phased | | | | | ercei | ntage | e | | | | | | | | | | | | | |
| wealth in a phased manner over the period from 60 years. (or any other retirement age as prescribed by employer) r.070 years. Subscriber has to withdraw minimum of 10 % of the remaining pension wealth every year; at the age of 70 years, subscriber would compulsory withdraw any amount lying to their credit. Also, note that in phased withdrawal of lump-sum amount, subscriber is subject to the NAV movement and may lose or gain in the future. For subscriber opting for phased withdrawal, the Central Recordkeeping Agency (CRA) maintenance charges would be deducted from the corpus/units lying in the account of the subscriber ection C – Subscriber's Bank Details: 1. For Electronic transfer or Direct Credit through ECS/NEFT/RTGS, Proof attached for Bank Details*: Cancelled Cheque Bank Certificate Please note that Mode of remittance of funds would be through ECS/NEFT/RTGS/Electronic Transfer only and applicable bank charges for direct credit would be deducted from pension wealth) 2. Type of Bank Account*: Savings A/c Current A/c Bank Name* | | | | | | | | | | | | | | | | | | | | | | | | |
| deducted from the corpus/units lying in the account of the subscriber cection C - Subscriber's Bank Details: 1. For Electronic transfer or Direct Credit through ECS/NEFT/RTGS, Proof attached for Bank Details*: Cancelled Cheque Bank Certificate (Please note that Mode of remittance of funds would be through ECS/NEFT/RTGS/Electronic Transfer only and applicable bank charges for direct credit would be deducted from pension wealth) 2. Type of Bank Account*: Savings A/c Current A/c 3. Bank A/c Number* 4. Bank Name* 5. Bank Branch* 6. Bank Address* 7. Pin Code* 9. Bank MICR Code (Wherever applicable) cection D - Subscriber's Annuity Details: 1. Annuity Service Provider Name *: 2. Annuity Service Provider Name *: Date: D D M M Y Y Y *Note: Left thumb impression in case of illiterate male claimants and Right thumb impression in case Impression of the Subscriber Impre | wealth in a ph Subscriber ha would compu | nased manner as to withdraw alsory withdra | over the w minimum nw any an | period um of 1 mount 1 | from 60 0% of the ying to t | years ne rer heir o | s (oi naini credi | r any ing p t. Al | oth pensi | er re ion v note | tiren wealtl that | nent a h eve in p | age ery | as p year | resc ; at | ribe the | ed by age | y en | nplo 70 y | yer) year | to ′ s, sı | 70 y ibsc | ears ribei | r |
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| Cancelled Cheque | Section C – S | ubscriber's | Bank D | etails: | ; | | | | | | | | | | | | | | | | | | | |
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| 7. Pin Code* | 5. Bank Brand | ch* | | | | | | | | | | | | | | | | | | T | 1 | | | |
| 9. Bank MICR Code (Wherever applicable) ection D – Subscriber's Annuity Details: 1. Annuity Service Provider Name *: 2. Annuity Service Provider Scheme Name *: | 6. Bank Addr | ess* | 1 1 | | | | | | l | | | 1 | 1 | 1 | | | 1 | 1 | ı | | 1 | | <u> </u> | _ |
| 9. Bank MICR Code (Wherever applicable) ection D – Subscriber's Annuity Details: 1. Annuity Service Provider Name *: 2. Annuity Service Provider Scheme Name *: | | | | | | | | | | | | | | | | | | | | | | | | |
| ection D – Subscriber's Annuity Details: 1. Annuity Service Provider Name *: 2. Annuity Service Provider Scheme Name *: | 7. Pin Code* | | | | 8. Bar | ık IFS | S Coo | de* | | | | | | | | | | | | | | | | |
| 1. Annuity Service Provider Name *: 2. Annuity Service Provider Scheme Name *: | 9. Bank MICI | R Code (W | herever a | applicat | ole) | | | | | | | | | | 7 | | | | | | | | | |
| 2. Annuity Service Provider Scheme Name *: | | | | | ils: | I | <u> </u> | · | ı | | l | 1 | | ı | 1 | | | | | | | | | |
| | 1. Annuity So | ervice Provid | er Name | *: | | | | | | | | | | | | | | | 1 | | | | | |
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| b hereby declare that the information provided above is true to the best of my knowledge and belief. Date: D D D M M Y Y Y Y *Note: Left thumb impression in case of illiterate male claimants and Right thumb impression in case Signature/Left Thumb Impression of the Subscriber | 2. Annuity So | ervice Provid | er Schem | e Name | e *: | <u> </u> | | | | | | | I | 1 | | | | l | | | | | | _ |
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| *Note: Left thumb impression in case of illiterate male claimants and Right thumb impression in case Signature/Left Thumb Impression of the Subscriber | Ido hereby declare | that the inform | nation pro | vided ab | | | | | | | edge : | and b | elief | | | | | | | | | | | |
| *Note: Left thumb impression in case of illiterate male claimants and Right thumb impression in case Signature/Left Thumb Impression of the Subscriber | | | | | | | | | • | | - | | | | | | | | | | | | | |
| | *Note: Left th | umb impressi | on in case | | | clain | nants | and | Rig | ht th | umb | impr | essio | on ir | cas | e | | | | | | | | r |

| <u>Form 301</u> | | Page 3 |
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| TO BE FILLED/ATTESTED BY POP/POP-SP | | |
| Certified that the above declaration and nomination details ha | as been signed / thumb impressed before me by | |
| The date of attaining the age of 60 years of the subscriber | entries / entries have been read over to him / her by me and got is as given below: | confirmed by him / her. |
| (DDMMYYYY) | | |
| (DDMM1111) | | |
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| Rubber Stamp of the POP/POP-SP | Signature of the Authorised Person | |
| | | |
| POP/POP-SP Registration Number(Allotted by CRA) | Designation of the Authorised Person : | |
| | POP/POP-SP Name: | |
| Date: D D M M Y Y Y Y | | |
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| Form 301 | 1 Page 4 |
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Annexure for Nomination Details

The details of nominees to whom the outstanding pension wealth of subscriber is payable, in case of demise of the subscriber before entire proceeds are withdrawn. (**Please refer General Instruction no.6**).

| Middle Name Mid | 2nd Nominee st Name* ddle Name | 3rd Nominee First Name* |
|--|---|---|
| First Name* First Middle Name Middle Name | st Name* | |
| Middle Name Mid | | |
| | ddle Name | |
| | ddle Name | |
| Last Name Las | | Middle Name |
| Last Name Las | | |
| Last Name Las | | |
| | st Name | Last Name |
| | | |
| | | |
| 2. Date of Birth* (Only in case of a minor): | | |
| | d Nominee | 3rd Nominee |
| | | |
| 3. Relationship with the Nominee*: 1st Nominee 2nd | d Nominee | 3rd Nominee |
| 130 1 volumec Zilla | | |
| | | |
| | | |
| 4. Percentage Share*: 1st Nominee | d Naminas | / 2nd Naminas |
| 1st Nominee % 2nd | d Nominee 9 | 6 3rd Nominee |
| 5. Nominee's Guardian Details* (Only in case of a mine | nor): | |
| 1st Nominee's Guardian Details | 2nd Nominee's Guardian Details | 3rd Nominee's |
| Guardian Details | | |
| First Name* First | st Name* | First Name* |
| | | |
| | | <u> </u> |
| Middle Name Mid | ddle Name | Middle Name |
| | | |
| | | _ |
| Last Name Las | st Name | Last Name |
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| | | I the outstanding pension wealth out of |
| he phased lump sum withdrawal in the account of ame would be treated as full and final discharge of Details of the witnesses*: | f the subscriber will be paid to the nomin of the obligation. | nees as mentioned in this form and the |
| he phased lump sum withdrawal in the account of ame would be treated as full and final discharge of | f the subscriber will be paid to the nomin of the obligation. | |
| | f the subscriber will be paid to the nomin of the obligation. | nees as mentioned in this form and the |

INSTRUCTIONS FOR FILLING UP THE FORM

This application should be filled by the Subscriber seeking to withdraw the pension wealth benefits on attaining 60 years of age

Documents to be enclosed with the application:-

- 1. Copy of PRAN card. In case PRAN card is not available, the subscriber needs to submit a duly notarized Affidavit as to the reasons of non-submission of the PRAN card.
- 2. Cancelled cheque (containing Subscriber Name, Bank Account Number and IFS Code) or Bank Certificate Containing Name, Bank Account Number and IFSC code, for direct credit or electronic transfer.
- 3. A pre-signed receipt acknowledging the receipt of the proceed under NPS by the subscriber
- 4. In addition to the PRAN card any other Identification and address proof of the subscriber. The documents that can be provided as identification and address proof are as mentioned below:
 - a) Ration Card with photograph and residential address
 - b) Bank Passbook with photograph and residential address
 - c) Credit Card with photograph, any other address proof like latest telephone bill, electricity bill in the name of the subscriber.
 - d) Passport
 - e) Aadhar Card issued by UIAD
 - f) Voter's Photo Identity Card with residential address
 - g) Driving license with photograph and residential address
 - h) PAN card and any other address proof like latest telephone bill, electricity bill in the name of the subscriber.
 - i) Certificate of identity with photograph signed by a Member of Parliament or Member of Legislative Assembly or Municipal Councilor or a Gazetted Officer and any other address proof like latest telephone bill, electricity bill in the name of the subscriber

In case if the address is not present on any of the above documents or differs with address provided in this form, proof in respect of current residential address like latest telephone bill, electricity bill in the name of the subscriber should be submitted.

GENERAL INSTRUCTIONS:

- 1. All the columns in the form should be filled with black ink pen without any overwriting.
- 2. Fields marked with (*) are mandatory.
- 3. Correct postal address, including the pin code should be provided.
- 4. Percentage of allocation for amount to be withdrawn as Lump-sum and amount to purchase life annuity. Subscriber can withdraw maximum 60% of pension wealth and is required to transfer minimum 40% of pension wealth to annuity. For example, for a total corpus of Rs.1000/-, if subscriber wants Rs.300 as lump-sum and Rs.700 for annuitisation, subscriber to select 30% and 70%.
- 5. Please select the type of lump-sum withdrawal as one-time or phased. For e.g. for a total corpus of Rs. 1000/- subscriber has selected Rs. 300 as lump-sum amount. For one time withdrawal subscriber will be given Rs. 300 as lump-sum amount on processing of withdrawal request. For phased withdrawal subscriber will be given minimum of 10% i.e. Rs. 30 for the period of 10 years, at the age of 70 years, subscriber would compulsorily withdraw any amount lying to their credit.
- 6. Instructions for nomination
 - Subscriber can nominate maximum of three nominees.
 - Subscriber can not fill the same nominee details more than once.
 - Percentage share value for all the nominees must be integer. Fractional value will not be accepted.
 - 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.
 - If a nominee is a minor, then nominee's guardian details will be mandatory

<u>For the purpose of this document Pension Wealth means:</u> The total amount of contributions made by the subscriber in the scheme plus the investment income derived from the investment of the contributions made by the subscriber from the date of joining of New Pension System till the date of execution of withdrawal request in the CRA System.

<u>Form 301</u> <u>Page 6</u>

CLAIM FOR THE WITHDRAWAL OF ACCUMULATED PENSION WEALTH OF THE SUBSCRIBER UNDER NEW PENSION SYSTEM

| Advanced Stamped Receipt |
|--|
| Icovered under the New Pension System with Permanent |
| Retirement Account Number (PRAN)has received a sum of Rs. /- |
| (Rupeesonly) from New Pension System / |
| New Pension System Trust by deposit in my Saving Bank / Current Account towards the settlement of my New Pension System (NPS) account. |
| Affix 1 Rupee Revenue Stamp and sign across |
| Signature or Left/ Right hand thumb impression of the NPS Subscriber* |
| $(*Note: Left\ thumb\ impression\ in\ case\ of\ illiterate\ male\ claimants\ and\ Right\ thumb\ impression\ in\ case\ of\ illiterate\ female\ claimants\ must\ be\ obtained.)$ |
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| Form 301 | Page 7 |
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ACKNOWLEDGMENT RECEIPT

| Acknowledgment slip to th | ne NPS Subscriber on receipt of completed application (To be filled by POP/POP-SP) | ation form for Withdrawal |
|---|--|---------------------------|
| | (10 be lined by POP/POP-SP) | |
| Received from PRAN : | | |
| POP Registration Number : | POP-SP Registration Number: | |
| Received at: | _ Date : | Time: |
| Acknowledgement Number : (Generated by CRA) | | |
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