

SBI Pension Funds Private Limited



SBI PENSION FUNDS (P) LTD.

Standard Operating Procedure for Individual Subscribers

For

Aadhaar Paperless Offline e-KYC based PRAN generation



The SBI Pension Funds Private Limited module being offered to Subscribers is an online portal wherein a Subscriber can register online and make contribution. A link is displayed on POP website for opening NPS account. After clicking on the link, Subscriber will be redirected to NSDLNPS application for registration. The process of PRAN generation is Aadhaar Paperless Offline e- KYC based wherein the Subscriber authenticates himself/herself through Aadhaar. Subscriber needs to have his\her mobile number updated in the UIDAI database. The basic details of the subscriber (Name, Date of birth and address) are fetched from the UIDAI database and restof thedetails (bank details, nomination, scheme preference and personal details) are to be filled by the Subscriber.

Pre-requisite for generation of PRAN:

- a. A mobile number update in UIDAI database.
- b. Aadhaar Paperless Offline e-KYC XML file (It will be Zip file). If not available the same can be downloaded from UIDAI website
- c. Scanned copy of PAN card and Cancelled Cheque in *.jpeg/ *.jpg/ *.png format having file size between 4KB 2MB
- d. Scanned of Signature in *.jpeg/ *.jpg/ *.png format having file size between 4KB 5MB
- e. An active internet banking enabled bank account with one of the empaneled banks for completion of payment. For the updated list of empaneled banks please check on the link available on the page.

A brief journey for registration of Individual Subscriber is mentioned below:

- a. Subscriber is required to enter mobile no., upload the Aadhaar Paperless Offline e-KYC XML zip file and enter the share code.
- b. If the subscriber does not have the Aadhaar XML file, the subscriber is provided with the link re-directing them to the UIDAI portal to download the XML data packet along with the share code. It hardly takes a minute to download the XML data packet.
- c. The basic KYC details i.e. Name of Subscriber, DOB (Date of Birth), Gender, Address and Photo will be fetched from UIDAI database.
- d. Other mandatory details i.e., Personal details, FATCA details, Nomination details, Employment details and Scheme Preference details are to be filled by subscriber.



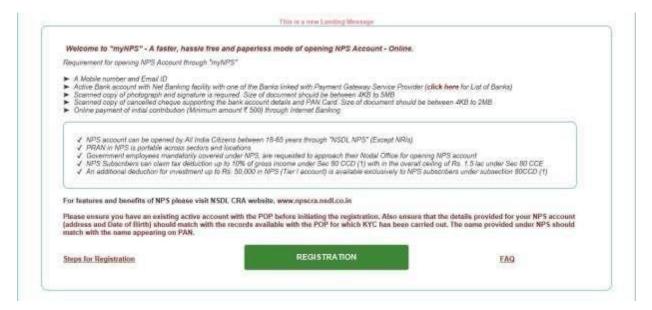
- e. After filling all the details, subscriber is required to upload scanned copy of Cancelled cheque, PAN card and scan of signature. Please refer to the specifications available on screen while uploading the documents.
- f. A PRAN will be immediately generated after making a successful Payment of minimum of Rs. 500/- to the subscriber account (In case of Tier I registration only. In case of combined Tier-I and Tier-II registration payment towards both the accounts need to be made). As there is no KYC verification process, the PRAN will be in Active status.
- g. Please ensure you have an active internet banking enabled bank account with one of the empaneled banks for completion of payment. For the updated list of empaneled banks please check on the link available on the page.
- h. After PRAN generation, he can e-Sign the form online through Aadhaar authentication (this process is completely paperless)

Step by Step guide for Individual Subscriber for registration:

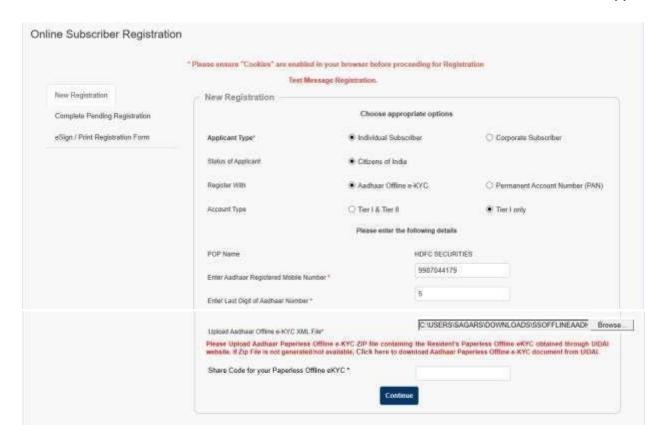
1. Click on the link available in SBI Pension Funds Private Limited website for Subscriber registration. You will be directed to Landing Page of NSDL NPS application as shown below. Brief "Steps for registration" and "FAQs" are available on the Landing page for your quick reference. Please ensure you



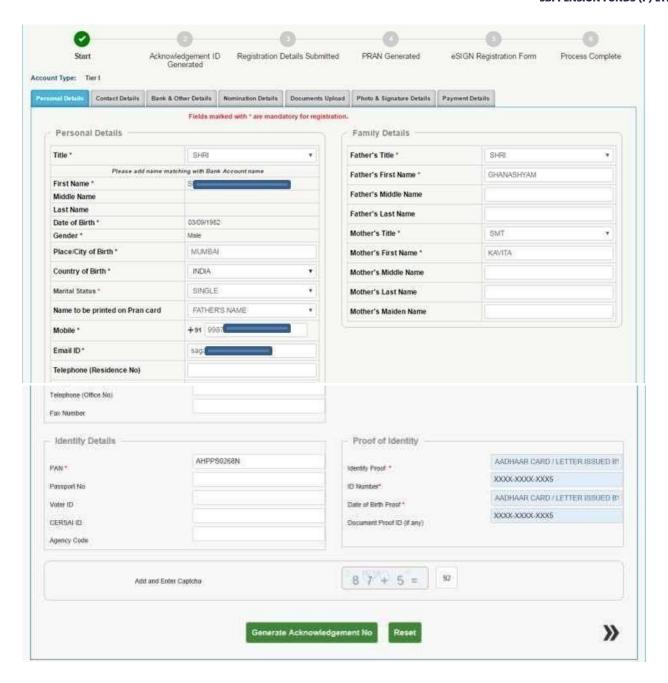
have gone through the pre-requisites for account opening to ensure a seamless experience. Please click "Registration" button.



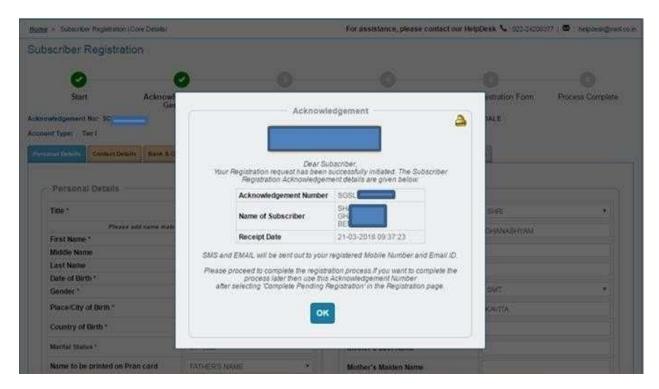
2. Screen as shown below will open. Please select the radio button represented as "Individual Subscriber" for registration as a subscriber for NPS. After selecting Account Type, subscriber is required to enter the mobile number registered with UIDAI database, last digit of Aadhaar number, upload the XML file and Share code. In case you do not have the Aadhaar XML file, please click on the link re-directing to the UIDAI portal to download the XML data packet along with the share code. It hardly takes one minute to download the XML data packet.



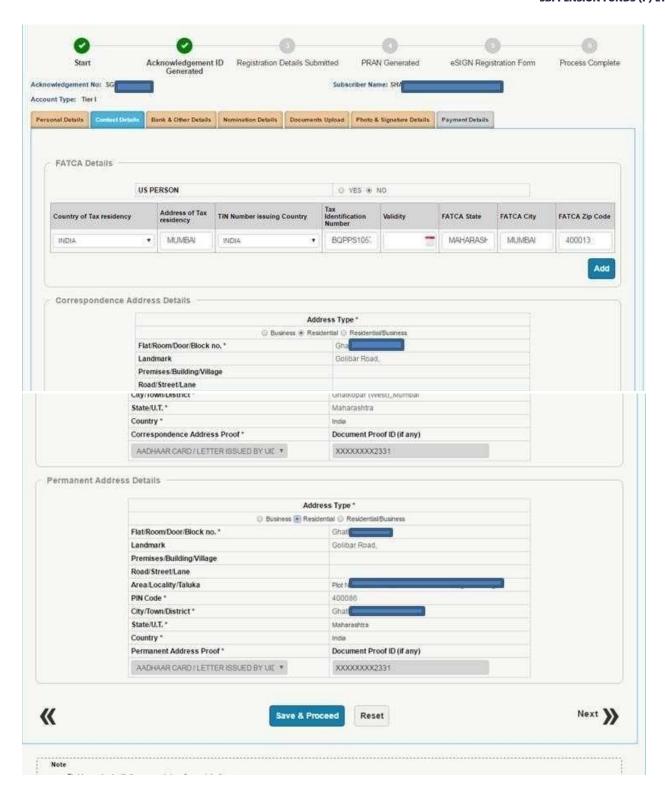
3. The basic details of the subscriber Name, DOB and Address) are fetched from the UIDAI database and rest of the details (bank details, nomination, scheme preference and personal details) is to be filled up by the subscriber. After filling all the personal details, click on "Generate Acknowledgement No."



4. Acknowledgement number will be generated and the same will be sent to registered mobile no. and Email ID.



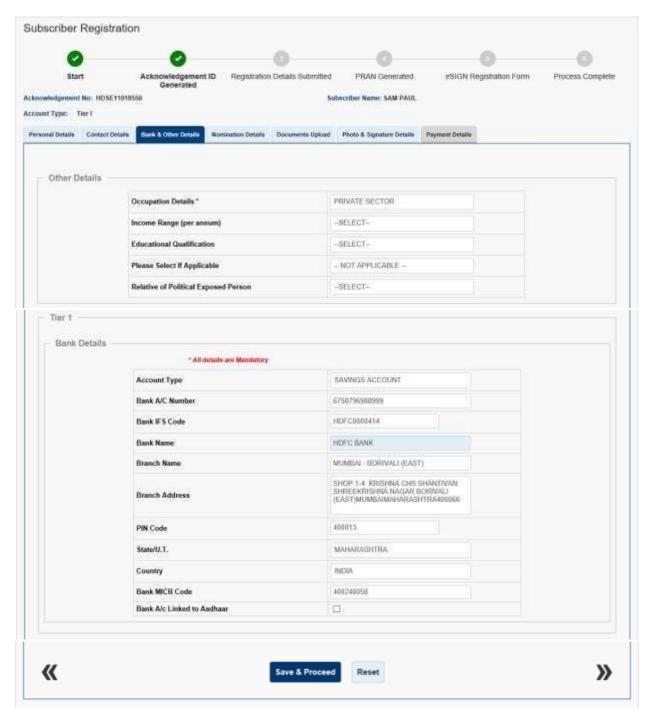
5. After clicking on "Ok", Subscriber will be directed to fill up contact details. He/she is required to fill FATCA details and address will be fetched and populated from UIDAI database.



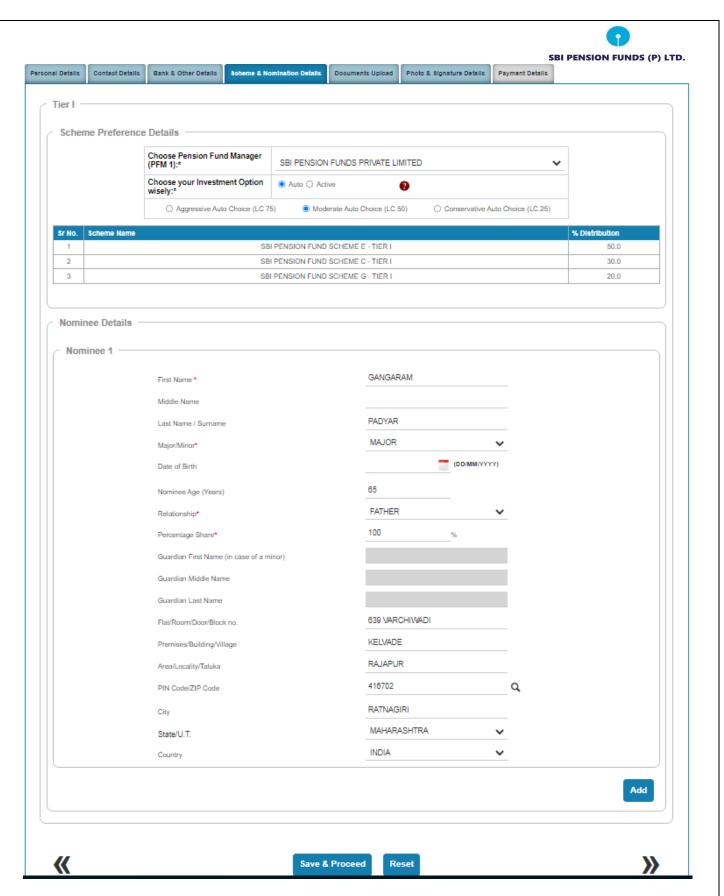
6. As a next step, subscriber is required to fill Bank details as shown in below screenshot. Please ensure that the Bank account details mentioned matches with the scanned copy of



the cancelled cheque which is uploaded. After entering correct details, click on "Save & Proceed".



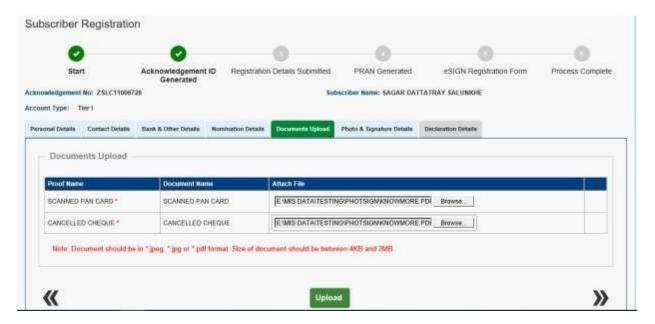
7. After clicking on Save and Proceed, Please enter Scheme Preference details and Nominee details.



8. Further, you are required to upload scan copy of "PAN Card" and "Cancelled Cheque". Please note that scanned copy of PAN card and Cancelled cheque is compulsory for Tier I

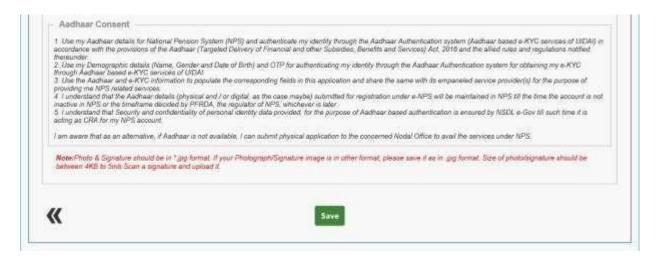


registration as well as for combined Tier I & Tier II registration. Please adhere to the specifications (size and type) of the documents provided on-screen.

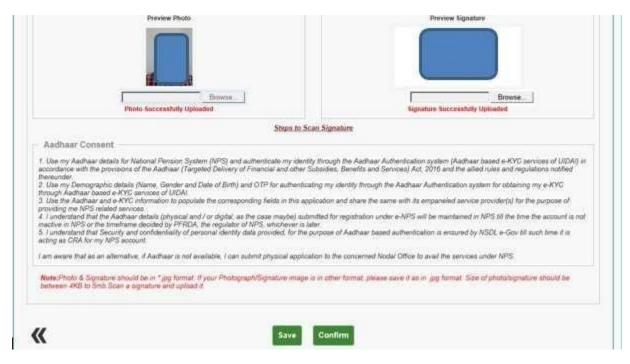


9. After clicking on "Upload", your photograph is fetched from the UIDAI database. You are required to upload the scan image of signature and then click on "Save" button. Please adhere to the specifications (size and type) of the images provided on-screen.



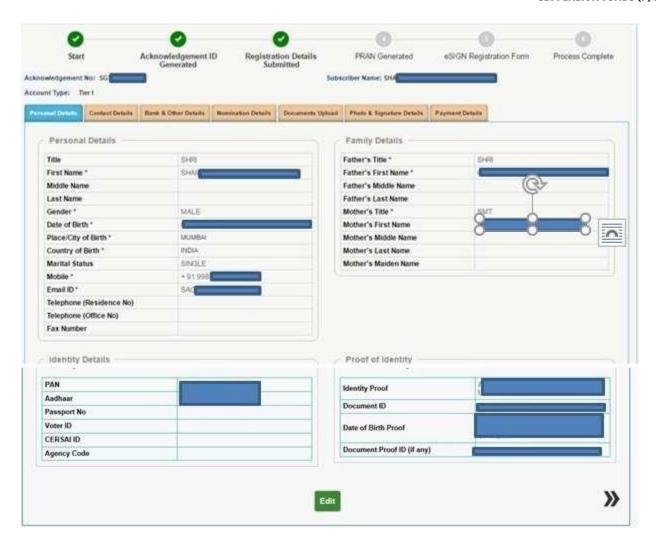


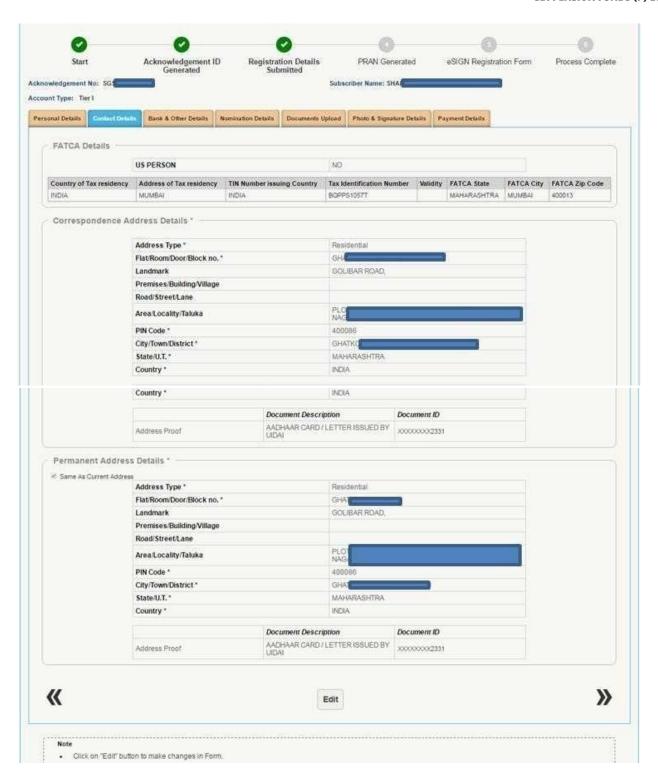
10. Please re-verify the Photo and signature and then click on "Confirm".

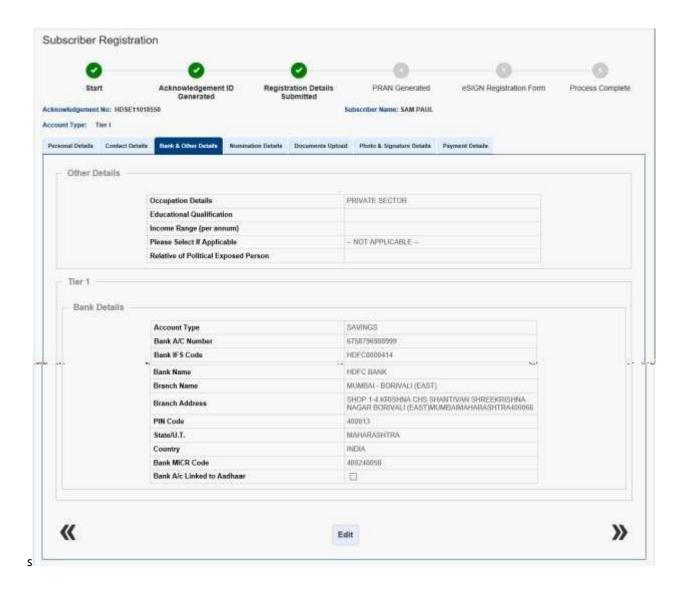


11. After clicking on "Confirm", system will display all the details which are entered under "Personal details, Contact details, Bank details, Nomination details, Scheme Preference, Documents and Photo Signature for reverification. If there is any issue with the details entered, then you can click on "Edit" button and rectify the details. Once the details are verified, click on "Proceed".





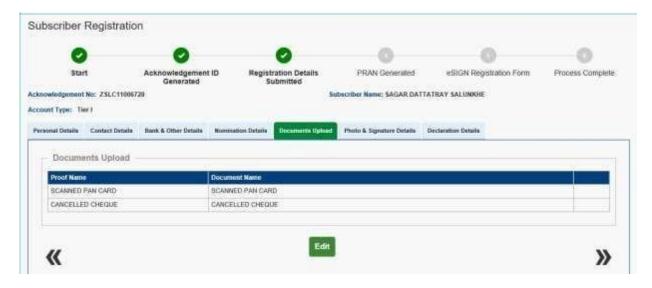


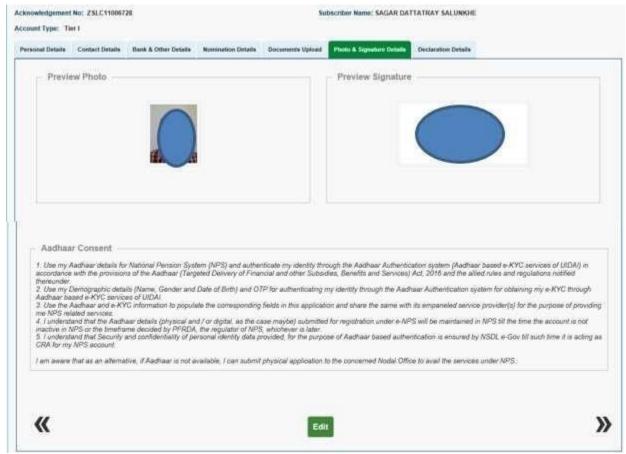




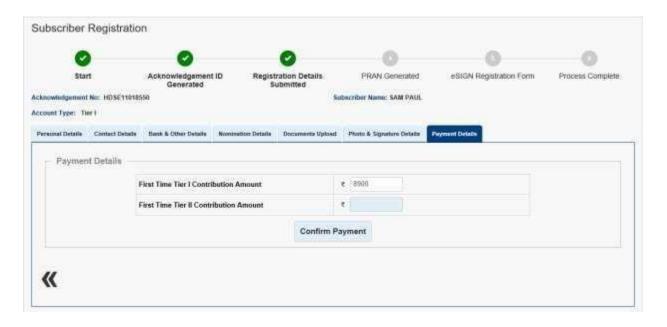
SBI PENSION FUNDS (P) LTD. Start Acknowledgement ID Registration Details PRAN Generated OTP Registration Process Authentication/eSign/View Registration Form Generated Submitted Completed Acknowledgement No: SBIP11328222 Subscriber Name: Account Type: Tier I Personal Details Confact Details Bank & Other Details Scheme & Homination Details Documents Upload Photo & Signature Details Payment Details Tier I Scheme Preference Details SBI PENSION FUNDS PRIVATE LIMITED Choose Pension Fund Manager (PFM 1):* Choose your Investment Option wisely:* Auto Moderate Auto Choice (LC 50) Choose your Investment Option wisely:* % Distributi SBI PENSION FUND SCHEME E - TIER 1 50.0 SBI PENSION FUND SCHEME C - TIER I 30.0 SBI PENSION FUND SCHEME G - TIER 1 20.0 Nominee Details Nominee 1 -First Name * GANGARAM Middle Name Last Name / Surname PADYAR Nominee Age (Years) 65 Date of Birth Relationship * FATHER Major/Minor * Major 100% Percentage Share * Guardian First Name (in case of a minor) * Guardian Middle Name Guardian Last Name Flat/Room/Door/Block no. 639 VARCHIWADI Premises/Building/Village KELVADE Area/Locality/Taluka RAJAPUR PIN Code/ZIP Code 416702 City RATNAGIRI MAHARASHTRA State/U.T. Country INDIA.

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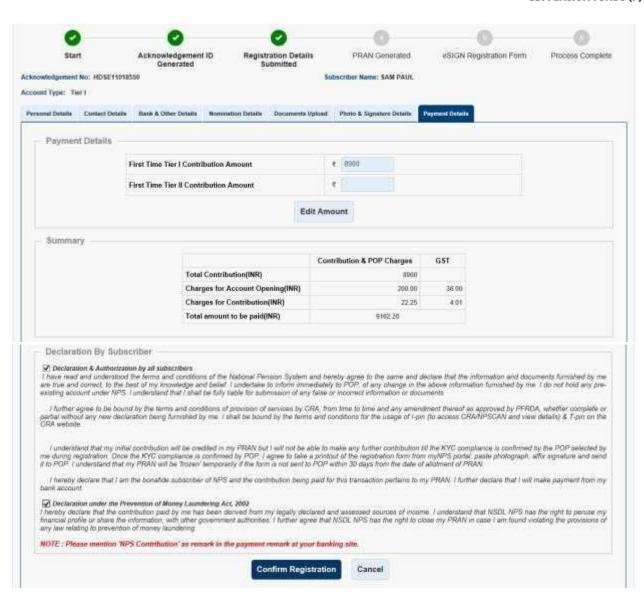




12. After clicking on proceed, subscriber is required to make payment for initial contribution. The minimum contribution can be done of Rs. 500/-. In case subscriber has selected account type as "Tier I and Tier II" in the starting, then he is required to make contribution in both the accounts. After entering amount, click on "Confirm Payment".



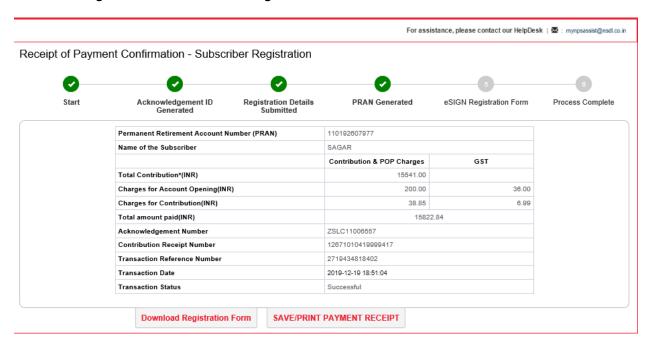
13. Contribution will consist of Contribution amount (separate for Tier I and Tier II), POP Registration charges, Contribution charges as prescribed by PFRDA (separate for Tier I and Tier II) and GST for the aforesaid charges. You are required to tick on declaration and then click on "Confirm Registration".







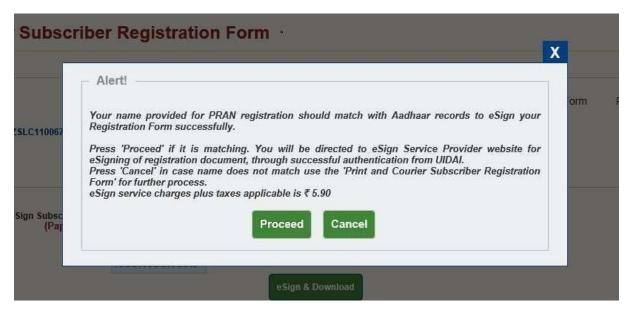
14. Post successful submission, PRAN will be generated for the subscriber and the breakup of the payment done would be displayed in the receipt, which be printed. Please download and save/print the receipt for future reference. An Email and mobile intimation is also sent to the registered Email ID and Mobile number. In order to download registration form or to do eSign, click on "Download Registration Form".



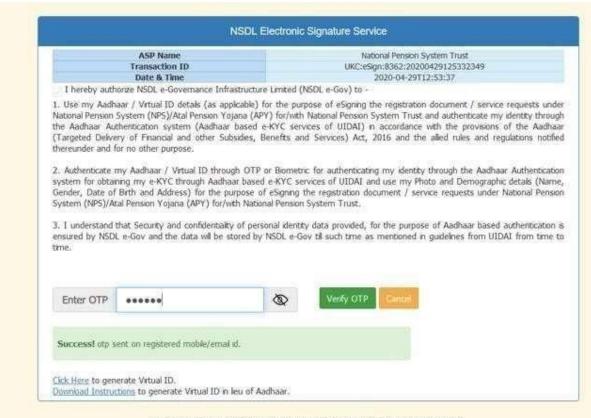
- 15. Post successful completion of PRAN generation, subscriber has two options.
 - a. This is a completely paperless process. Under this option, Subscriber can e-Sign the form. On successful completion of e-Sign process, subscriber need not submitthe physical form. It is recommended to utilize this option to avoid inconvenience.











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