

Voluntary Pension Schemes & Income Payment Plans Account Update Form (1 of 2)

Date: _____

Section 1: Account Holder Details

Account Title: _____ CNIC / Passport No. _____

Request Change in:

- Address / Contact Details (Section 2) Bank and Payment Details (Section 4) VPS Details (Section 6) Signature (Section 8)
 Operating & Mail Delivery Instructions (Section 3) Nominee Details (Section 5) IPP Details (Section 7)

Section 2: Address / Contact Details

Mailing Address: _____
Mobile No.: _____ Phone No.: _____ Email Address: _____

Section 3: Operating and Mail Delivery Instructions

1. Zakat Deduction: Yes No* (*kindly provide Zakat Exemption Affidavit) 2. Would you like to receive SMS Alerts: Yes No
3. Send Statements/Mails: Email* OR Postal Mail 4. Fund Manager's Report: Email Do not send

*Please provide valid Email ID in section 2

Section 4: Bank and Payment Details (Note: Bank Account must be in the name of the Principal Account Holder)

Bank Account Title: _____ IBAN: _____
Branch Name: _____ Branch Code: _____ Bank Name: _____
Bank Address: _____

Section 5: Nominee Details (attach additional pages in case of more than One nominee)

Name: _____ Share in nomination: _____% Father's / Husband's Name: _____
Minor: Yes No Name of Guardian (in case of Minor): _____ Relationship with Minor (in case of Minor): _____
CNIC / Passport No. (in case of Minor, provide Guardian's): _____ Expiry Date: _____-_____-_____
Address: _____ Date of Birth: _____-_____-_____
Mobile No.: _____ Phone No.: _____ Email Address: _____

Section 6: Selection of Allocation Scheme and Retirement Date for Voluntary Pension Schemes (VPS)

Select VPS Account for which you are requesting the changes:

Name of Voluntary Pension Scheme: JS Pension Savings Fund JS Islamic Pension Savings Fund
Type of Account: Normal VPS Account Provident-Fund Linked VPS Account

Update Retirement Age or Date:

Retirement Age / Date: _____

Update your Allocation Scheme choice:

Allocation Scheme (Select only one)	Sub-Fund Allocation (Specify % in increments of five)			Total (Ensure total is 100%)
	Debt	Equity	Money Market	
High Volatility <input type="checkbox"/>	20-35 _____% _____%	65-80 _____% _____%	Nil _____% _____%	100 %
Medium Volatility <input type="checkbox"/>	40-55 _____% _____%	35-50 _____% _____%	10-25 _____% _____%	100 %
Low Volatility <input type="checkbox"/>	60-75 _____% _____%	10-25 _____% _____%	15-30 _____% _____%	100 %
Lower Volatility <input type="checkbox"/>	40-60 _____% _____%	Nil _____% _____%	40-60 _____% _____%	100 %
Customized Asset Allocation* <input type="checkbox"/>	0-100 _____% _____%	0-100 _____% _____%	0-100 _____% _____%	100 %

You may change your selected Allocation Scheme on an annual basis as per details provided in the Offering Document.

* Customized Asset Allocation Scheme shall have the choice of investing up to 100 percent (i.e. between 0-100%) in any Sub-Fund.

Section 7: Selection of Income Payment Plan and Allocation Scheme

1. Select the Income Payment Plans (IPP) for which you wish to make updates:

- Conventional IPP (under JS Pension Savings Fund (JSPSF)) Islamic IPP (under JS Islamic Pension Savings Fund (JSIPSF))

2. Revised Plan Term / Period: _____ Years (Up to 15 Years after retirement | Disbursements under a Plan of 10 Years or more will be exempt from Tax,)

3. Choose one of the following Allocation Options:

- Default Allocation Option
75% of transfer amount will be invested in money market sub-fund. This amount will be used for your monthly Pension Payments
25% of transfer amount will be set aside for growth, allocated in Money Market sub-Fund (35%), Debt sub-Fund (45%) and Equity sub-Fund (20%)
 Customized Allocation Option

Segment	Growth Segment _____ (0%-100%) (This amount is set aside for Growth, and disbursed upon maturity of Plan)			Pension Segment _____ (0%-100%) (This amount will be used for your monthly Pension Payments)	
	Money Market sub-Fund	Debt sub-Fund	Equity sub-Fund	Money Market sub-Fund	Debt sub-Fund
Allocation in sub-Fund	_____ (0%-100%)	_____ (0%-100%)	_____ (0%-100%)	80%	20%

4. Choose one of the following Pension disbursement option (payment will be made from Pension Segment in both options)

- Fixed Monthly Payment (in PKR) _____ (amount in words) _____
 Draw-Down Monthly Payment (Draw-Down method calculates disbursement amount every month by dividing Pension Segment Balance by remaining number of months)

For Official Use

Channel Partner: _____ Region / City: _____ Branch Name / Code: _____
Relationship Manager: _____ Comments: _____

Proof of Application for VPS Account Update - (Investor's Copy)

Account Title: _____ CNIC No. _____
Account Update requested: _____ Relationship Manager: _____
Channel Partner: _____

Date: _____

Receiving Stamp & Signature:

Voluntary Pension Schemes & Income Payment Plans Account Update Form (2 of 2)

Section 8: Signature change I Update CNIC on records

In case of Signature change, please provide new specimen signature:

Name: _____

CNIC /Passport: _____

I wish to provide a renewed CNIC for records (attach copy of CNIC with this form)

Specimen Signature on Records

New Specimen Signature

Section 9: Declaration (for All Applicants)

- I hereby acknowledge that I have fully understood all the reference notes, and provisions of the Trust Deed and Offering Document. Further, I ratify that the information provided in this Form is correct.
- I also agree and accept that nomination(s) shall not be binding upon Management Company and the Trustees, who may at their sole discretion, demand for Succession Certificate or any other mandate from a competent authority.

Account Holder Signature

Witness Name (1):

CNIC No:

Witness Name (2):

CNIC No:

Note: In case of Shaky signature / Thumb Impression, two witnesses are required to sign the form.

Reference Notes

- If any field is not applicable, please write N/A.
- Management Company or Trustee has the right to reject application.
- Web/ Mobile App User ID and Password (if requested) shall be sent via Email.
- Zakat Exemption Affidavits of all joint holders are required for Zakat Exemption. In case of Non-muslim, Zakat Deduction will not be applicable.