



NBP FULLERTON ASSET MANAGEMENT LIMITED

Guidelines for Completing Account Update Form

In respect of any change(s) desired by the Participant, in their particulars, a facility through this form is being provided to the Participants to incorporate such change(s) within the Register of Participants. However, such change will be permissible, provided it is authenticated by the required Authorized Signatories.

1. INFORMATION ABOUT THE PARTICIPANT

The Participant would need to state his/ her Name, NAFA A/c No. allotted at account opening stage.

- The Participant can change their Address/ Contact Details provided at the time of account opening.
- The Participant can change the status of Zakat by ticking of the available option as provided. It is also mandatory for the Participant to provide certified true copy of said declaration.

2. THE NOMINEE(S)

- The Participant can Delete/ Add/ Change the Nominee(s) as registered at the time of account opening. As per Companies Ordinance 1984, nominee shall only be Spouse, Father, Mother, Brother, Sister, Son and Daughter including a step or adopted child.
- In case of more than 5 nominees please use additional sheet duly signed.

3. BANK ACCOUNT

The Participant can change the Bank details as were provided in Account Opening Form.

4. DELIVERY OF STATEMENTS

The Participant may change the mode of delivery of account statements.

5. REGULAR CONTRIBUTION

The Participant can change his/her/ Regular Contribution amount and frequency.

6. ALLOCATION SCHEME

The Participant may change the allocation scheme twice in a financial year presently or as per VPS rules.

(A) Allocation of Monthly Sub-Plan

Monthly Sub-Plan	Money Market	80%
	Debt	20%

(B) Allocation of Growth Sub-Plan

Age of Participant	Equity Sub-Fund		Debt Sub Fund		Money Market Sub Fund	
	Maximum	Minimum	Maximum	Minimum	Maximum	Minimum
43-60	100%	0%	100%	0%	100%	0%
61	95%	0%	95%	0%	100%	5%
62	90%	0%	90%	0%	100%	10%
63	85%	0%	85%	0%	100%	15%
64	80%	0%	80%	0%	100%	20%
65	75%	0%	75%	0%	100%	25%
66	70%	0%	70%	0%	100%	30%
67	65%	0%	65%	0%	100%	35%
68	60%	0%	60%	0%	100%	40%
69	55%	0%	55%	0%	100%	45%
70	50%	0%	50%	0%	100%	50%
71	45%	0%	45%	0%	100%	55%
72	40%	0%	40%	0%	100%	60%
73	35%	0%	40%	0%	100%	60%
74	30%	0%	40%	0%	100%	60%
75	25%	0%	40%	0%	100%	60%
76	25%	0%	40%	0%	100%	60%
77	25%	0%	40%	0%	100%	60%
78	25%	0%	40%	0%	100%	60%
79	25%	0%	40%	0%	100%	60%
80	20%	0%	40%	0%	100%	60%
81	20%	0%	40%	0%	100%	60%
82	15%	0%	40%	0%	100%	60%
83	10%	0%	40%	0%	100%	60%
84	5%	0%	40%	0%	100%	60%
85	0%	0%	40%	0%	100%	60%