

**APPLICATION FORM FOR FAMILY PENSION**

To,  
The Trustees  
Bank of India Pension Trust,  
Mumbai.

Dear Sir,

**Request for Family Pension**

I regret to inform you that Shri / Smt. \_\_\_\_\_ who was employee of the Bank died on \_\_\_\_\_.

After his / her death, I am the first / next family member being wife / son / daughter of deceased employee eligible for family pension.

I therefore request you to grant me family pension as per Bank's Pension Scheme, 1995.

I submit the required particulars as under :-  
(fill the applicable column)

- (i) Full Name of the Applicant
  - (a) Widow / Widower : \_\_\_\_\_
  - (b) Unmarried Son : \_\_\_\_\_  
(not over 25 years)
  - (c) Un married Daughter : \_\_\_\_\_  
(not over 25 years)
  - (d) guardian in case of minor / : \_\_\_\_\_  
physically & mentally  
handicapped child
- (ii) Date of Birth (Family pensioner) : \_\_\_\_\_
- (iii) Whether employed / not employed : \_\_\_\_\_
- (iv) Savings Bank A/C No. : 

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I hereby declare that :-

- i. I have not again married / remarried
- ii. I have been appointed / not appointed by the Bank on compassionate grounds

I submit herewith :-

- (a) A certified copy of death certificate of the pensioner
- (b) A certified copy of Birth Certificate / School Leaving Certificate
- (c) Latest Passport size photograph of self (two)
- (d) Latest Passport size photograph of the next family member eligible for family pension
- (e) Other relevant documents establishing identity such as photocopy of election identity card, PAN Card etc.
- (f) In case of family pension for son or daughter who are physically crippled or suffering from disorder or disability of mind-certificate from the Doctor approved by the Bank to the effect that the disability or handicap is of such a nature as to prevent him / her from earning livelihood, stating exact mental or physical condition of a child (such certificate is to be produced every three years to the Bank).

Yours faithfully,

Signature / Thumb impression  
of the applicant / legal guardian

Witness : (X)

- (1) Signature : \_\_\_\_\_  
Name : \_\_\_\_\_  
Address : \_\_\_\_\_
- (2) Signature : \_\_\_\_\_  
Name : \_\_\_\_\_  
Address : \_\_\_\_\_



(TO BE FILLED BY THE BRANCH / OFFICE)

BANK OF INDIA

REF.NO. F -

\_\_\_\_\_ ZONE  
WORKSHEET FOR FAMILY PENSION CASES ONLY

I. Ex-staff : Shri / Smt. \_\_\_\_\_  
 (Surname) (First Name) (Middle Name)

Category : Officer / Clerk / Sub staff (Full time / Part time) ⊙1/3 or 2/3 or 3/4

Date of Death : \_\_\_\_\_ PF Account No.: \_\_\_\_\_

Last working date : \_\_\_\_\_ Grade : \_\_\_\_\_ Qualification: \_\_\_\_\_

(Attending Office)

Total service in Bank \_\_\_\_\_ Years \_\_\_\_\_ Months

Less Non-Qualifying service \_\_\_\_\_ Years \_\_\_\_\_ Months

Service qualifying for Pension \_\_\_\_\_ Years \_\_\_\_\_ Months

II. **Details of Emoluments Actually Drawn / payable for  
 the month prior to the date of retirement / death**  
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Last Month / Year	Basic Pay (Including Stagnation Increments)(Rs.)	Special Pay (Only For Award Staff) (Rs.)	ALLOWANCES DRAWN			CCA reckoned for PF Award Staff only (Rs.)	Officiating Allowance (Rs.)
			Graduation Pay / PQP (Rs.)	Fixed Personal Pay (Rs.)			
Actual Salary Drawn @							
Payable for the last month @@							
TOTAL							

@ As per last salary slip ; @@ Basic pay, etc payable on full month basis (notional)

III.

**CERTIFICATE**

We certify that,

- (1) The employee has opted for Pension
- (2) No disciplinary action was pending / initiated / contemplated against the employee at the time of Retirement / Death
- (3) The information given in the sheet is verified and found correct.

Branch Recommendation endorsed

Verified & Recommended \_\_\_\_\_

Chief Manager / Manager

Zonal Manager

Name \_\_\_\_\_

\_\_\_\_\_ Zone

\_\_\_\_\_ Branch

PF No. \_\_\_\_\_

PF No. \_\_\_\_\_

Date :

Date :

Branch Seal :

Ref No – F \_\_\_\_\_

ANNEXURE F-4

**Declaration regarding non-marriage / re-marriage  
To be submitted by surviving spouse at the time of  
Initial disbursement and thereafter once in six month  
As of May and November**

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The Assistant General Manager /  
The Chief Manager / Manager

\_\_\_\_\_ Branch

**My Pension Account**

I am / will be drawing Family Pension through your Branch. As required under the Bank of India (Employees) Pension Regulations, 1995 I hereby declare that till date I am, after the death of my spouse, not re-married. Further, in case I get remarried at any future date, I undertake to advise you / the Pension disbursing Branch immediately.

\_\_\_\_\_  
Signature / Thumb  
Impression

Place :

\_\_\_\_\_  
Name of the Pensioner

Date :

**Certificate from Branch Officer**

I hereby certify that to the best of my knowledge and belief the above declaration made by \_\_\_\_\_ signed in my presence is correct.

\_\_\_\_\_  
(Signature of Bank Officer with  
P.F. No-----.)

Place :

Name: \_\_\_\_\_

Date :

Designation : \_\_\_\_\_

[ Note : This certificate is to be retained at the Branch and the Branch to inform the Head Office, Terminal Benefits Department to STOP the Pension, if the Family pensioner declares that he/she has got married, which renders him/her ineligible to draw family pension ]

Ref No – F \_\_\_\_\_

ANNEXURE F-5

**Certificate of Non-marriage to be submitted  
by unmarried Daughter / Son at the time of  
Initial disbursement and thereafter once in six month  
As of May and November**

The Assistant General Manager /  
The Chief Manager

\_\_\_\_\_ Branch

I hereby declare that I am not married.

I undertake to immediately advise the pension disbursing Branch in case I get married at any future date.

\_\_\_\_\_  
Signature / Thumb Impression

Place :

Date : \_\_\_\_\_

Name of the Pensioner

The Assistant General Manager /  
The Chief Manager

\_\_\_\_\_ Branch

I hereby certify that to the best of my knowledge and belief the above declaration made by \_\_\_\_\_ signed in my presence is correct.

\_\_\_\_\_  
(Signature of Bank Officer with  
P.F No.-----.)

Place : \_\_\_\_\_ Name : \_\_\_\_\_

Date : \_\_\_\_\_ Designation : \_\_\_\_\_

[ Note : This certificate is to be retained at the Branch and the Branch to inform the Head Office, Terminal Benefits Department to STOP the Pension, if the Family pensioner i.e the Son / daughter declares that he/she has got married, which renders him/her ineligible to draw family pension ]

Ref No - F \_\_\_\_\_

ANNEXURE F-6

**Non-employment / Re-employment Certificate**

I, Shri / Smt. \_\_\_\_\_ (Pension Ref. No. \_\_\_\_\_ / Ex-gratia No. \_\_\_\_\_) hereby declare that I am not employed / re-employed under Government / Public Sector Undertakings / Autonomous Body. I further declare that I am not employed / re-employed or absorbed in a Central / State Government / Corporation Undertakings or in an Autonomous Body. In the event of my employment / re-employment I shall intimate the Bank as required in Pension Regulation No.40 (1) (b) / 50.

Date : \_\_\_\_\_  
Name : \_\_\_\_\_  
Pension Reference : \_\_\_\_\_  
Address : \_\_\_\_\_

Signature

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**Certificate from Branch Officer**

I hereby certify that to the best of my knowledge and belief the above declaration made by \_\_\_\_\_ signed in my presence is correct.

\_\_\_\_\_  
(Signature of Bank Officer with  
P.F. No-----.)

Place : \_\_\_\_\_ Name: \_\_\_\_\_

Date : \_\_\_\_\_ Designation : \_\_\_\_\_

[ Note : This certificate is to be retained at the Branch ]

(To be submitted in duplicate)

Affix latest  
Passport size  
Photo of the  
applicant

I. **FAMILY PENSIONER'S PROFILE**

- (1) Full Name of Applicant : Mr./Mrs./Ms.  
(in block letters) \_\_\_\_\_
- (2) Sex-Male / Female : \_\_\_\_\_
- (3) Identification Marks : \_\_\_\_\_
- (4) Date of Birth of Applicant : \_\_\_\_\_
- (5) Permanent Address of Applicant : \_\_\_\_\_  
\_\_\_\_\_
- E-mail \_\_\_\_\_ State \_\_\_\_\_ PIN \_\_\_\_\_
- Tele No. [ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ] Mobile No [ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ]
- (6) Branch from where pension : Branch \_\_\_\_\_  
Payment is desired : Zone \_\_\_\_\_
- (7) 15 digit Savings Account Number : [ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ][ ]
- (8) Relationship with the Deceased Pensioner : \_\_\_\_\_  
(Widow / Widower / Son / Daughter)
- (9) Marital Status of the Applicant : \_\_\_\_\_  
Unmarried / Remarried

II.	<b>Family members (only Sons / Daughters)</b>	<b>Relationship with Deceased employee</b>	<b>Date of Birth</b>		
			<b>DD</b>	<b>MM</b>	<b>YY</b>
(1)	_____	_____	_____	_____	_____
(2)	_____	_____	_____	_____	_____

I hereby declare that above information is true and correct. Should you however require any documentary evidence, I shall produce the same on demand.

Date : \_\_\_\_\_ (Signature / Thumb Impression) of family pension applicant

**FOR OFFICE USE ONLY**

III. **PERSONNEL DATA OF THE DECEASED EMPLOYEE**

- (1) Full Name (in block letters) : \_\_\_\_\_
- (2) Date of Birth : \_\_\_\_\_
- (3) Date of Joining Bank's service : \_\_\_\_\_
- (4) Date when retired (if applicable) : \_\_\_\_\_
- (5) Date of Demise : \_\_\_\_\_
- (6) Name of Branch from where retired / ceased to be in service : \_\_\_\_\_
- (7) Category at the time of Retirement / Death : Officer / Clerk / Substaff (full time / part time)
- (8) Provident Fund Account No. : \_\_\_\_\_

Sign. / Thumb impression of \_\_\_\_\_ Attested

Chief Manager / Manager (P.F No. \_\_\_\_\_ .)  
\_\_\_\_\_ Branch