



# UTKAL GRAMEEN BANK

PERSONNEL DEPARTMENT

HEAD OFFICE: BOLANGIR

(SPONSORED BY STATE BANK OF INDIA)

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**STAFF CIRCULAR NO.30 OF 2024 (e-CIRCULAR NO.124/2024)**

**DATE: 18.10.2024**

All Branches/Offices,

## IMPLEMENTAION OF THE PENSION SCHEME IN RRBs w.e.f 01.11.1993

### UTKAL GRAMEEN BANK (EMPLOYEES') PENSION (AMENDMENT) REGULATIONS, 2024

Department of Financial Services (DFS), Ministry of Finance, Govt. of India vide their letter F.No.8/04/2024-RRB dated 03<sup>rd</sup> October, 2024 on the captioned subject has advised that pursuant to the directions of the Hon'ble Supreme Court, Government has decided to implement the pension scheme in RRBs with effect from 01.11.1993. Department of Financial Services, Ministry of Finance, Government of India vide its letter F.No.8/20/2010-RRB dated 03<sup>rd</sup> October, 2024 have communicated the approval of the following regulations after consultation with NABARD and State Bank of India being the Sponsor Bank.

(i) Model RRB (Employees') Pension(Amendment) Regulations, 2024

2. In exercise of the powers conferred by Section 30(1) of Regional Rural Banks Act, 1976, the Board of Directors of Utkal Grameen Bank have approved Utkal Grameen Bank (Employees') Pension (Amendment) Regulations, 2024.This was published in the Gazette of India, Extraordinary, Part-III, Section-4, both in Hindi & English languages, vide Notification No.813 dated 15<sup>th</sup> October, 2024 and copy of the same is enclosed herewith for reference of all concerned, like existing staff/ retired staff/Pensioners/Family Pensioners/Dismissed/Terminated/Removed/Resigned/ family members & legal heirs of deceased staff who are advised to be guided by the official Gazette.

3. Therefore through this circular it is informed to all such employees/legal heirs of eligible deceased employees, who were in the Bank's service on or before 31.03.2010 and who are currently not drawing pension/ have been resigned/ retired/deceased/compulsorily retired/dismissed/removed have to apply for pension/compassionate allowance with necessary documents to any Regional office of the Bank. The last date for submission of application is 30.10.2024.All forms related are available in Bank's Intranet and website as well.

#### **4. OPERATIONAL INSTRUCTION:**

- a) As per Utkal Grameen Bank (Employees') Pension (Amendment) Regulations, 2024, the eligible left out cases, viz. retired staff/voluntary retirement/resigned/dismissed/removed/compulsorily retired/terminated are required to submit their application in the prescribed format and refund within 15 days from 15<sup>th</sup> October, 2024, the date of publication of Notification in the Gazette of India, i.e. on or before 30<sup>th</sup> October, 2024 to become a member of the Utkal Grameen Bank (Employees') Pension Fund. Any option or application after the due date shall not be considered at any circumstances.
- b) Eligible left out family members/legal heirs of the deceased staff are required to apply in prescribed Format and refund within 30 days from 15<sup>th</sup> October, 2024, the date of publication of Notification in the Gazette of India, i.e. on or before 14<sup>th</sup> November, 2024 to become a member of Utkal Grameen Bank (Employees') Pension Fund.
- c) The Regional Offices should forward the applications along with other documents received from applicants to Head Office for further processing on urgent basis. The RO should keep proper record of all applications received so as to avoid any controversy in future.
- d) All the Branch Managers, Regional Managers & Heads of departments are advised to display this Circular in the notice boards of all Branches / Offices. The Circular along with all the enclosures / formats is also placed in the Bank's intra-net site and website [www.utkalgrameenbank.co.in](http://www.utkalgrameenbank.co.in) for information and necessary guidance.
- e) Branches / Offices are advised to utilize any feasible mode of communication to intimate all eligible left out cases/fresh cases and the family/legal heirs of deceased staff members about the revised pension regulation implemented by the Bank.

5. If there is any difference of opinion regarding interpretation of any provisions of revised pension scheme, the contents of Pension Gazette shall be considered final.

6. Please bring the contents of this Circular to the notice of all the staff members working in the Branches / Offices and all the retired staff members & family of the deceased staff members.

7. Please treat the matter as "MOST URGENT".



**(Shri Snehanshu Kumar Khandai)**

**GENERAL MANAGER-III**

**Encls: Copy of Pension Gazette & Application Formats**



# भारत का राजपत्र The Gazette of India

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उत्कल ग्रामीण बैंक

अधिसूचना

बलांगीर, 5 अक्टूबर, 2024

सं. पी ई आर /252.—क्षेत्रीय ग्रामीण बैंक अधिनियम, 1976 (1976 का 21वां) की धारा 17 की उपधारा (1) के साथ पठित धारा 30 द्वारा प्रदत्त शक्तियों का प्रयोग करते हुए उत्कल ग्रामीण बैंक का निदेशक मंडल, प्रायोजक बैंक स्टेट बैंक ऑफ इंडिया और राष्ट्रीय कृषि और ग्रामीण विकास बैंक के साथ परामर्श करने के बाद और केंद्र सरकार की पूर्व मंजूरी के साथ एतद्वारा उत्कल ग्रामीण बैंक (कर्मचारी) पेंशन विनियम, 2018 में संशोधन करने के लिए निम्नलिखित विनियम बनाता है, नामतः:

- (1) इन विनियमों को उत्कल ग्रामीण बैंक (कर्मचारी) पेंशन (संशोधन) विनियम, 2024 कहा जाएगा।  
(2) ये नियम राजपत्र में उनके प्रकाशन की तारीख से लागू होंगे।
- उत्कल ग्रामीण बैंक (कर्मचारी) पेंशन विनियम, 2018 (इसके बाद इसे उक्त विनियम कहा जाएगा) के, विनियम 2 के, उप-विनियम (1) के, खंड (के) में, आंकड़े, अंक और शब्द "अप्रैल, 2018 का पहला दिन" के स्थान पर "नवंबर 1993 का पहला दिन" आंकड़े, अंक और शब्द प्रतिस्थापित किए जाएंगे।

3. उक्त विनियमों में, विनियम 3 को निम्नलिखित विनियम से प्रतिस्थापित किया जाएगा, नामतः, -

"3. अनुप्रयोग - (1) कोई भी कर्मचारी जो -

(क) 1 सितंबर, 1987 और 31 मार्च 2010 के मध्य बैंक की सेवा में था और उत्कल ग्रामीण बैंक (कर्मचारी) पेंशन (संशोधन) विनियम, 2024 की अधिसूचना की तारीख से पहले सेवानिवृत्त या बर्खास्त या हटा दिया गया या सेवा की समाप्ति कर दी गई और आधिकारिक राजपत्र में उत्कल ग्रामीण बैंक (कर्मचारी) पेंशन (संशोधन) विनियम, 2024 की अधिसूचना की तारीख से पंद्रह दिनों के भीतर रिफंड करता है या निधि का सदस्य बनता है और उसके द्वारा प्राप्त संपूर्ण अंतिम राशि (कर्मचारी पेंशन योजना, 1995 के तहत भविष्य निधि में बैंक का योगदान और राशि की प्राप्ति की तारीख तक उस पर अर्जित ब्याज) को रिफंड कर देता है और कर्मचारी पेंशन योजना, 1995 के तहत उसके द्वारा प्राप्त आवधिक पेंशन, यदि कोई हो, तो आधिकारिक राजपत्र में उत्कल ग्रामीण बैंक (कर्मचारी) पेंशन (संशोधन) विनियम, 2024 की अधिसूचना की तारीख से पहले किसी भी अवधि के लिए आरोप्य, या अनारोप्य, किसी भी स्थिति में, ऐसी राशियों की प्राप्ति की तारीख से रिफंड की तारीख तक ऐसी राशियों पर ब्याज का भुगतान करना अपेक्षित नहीं होगा।

बशर्ते कि कोई कर्मचारी जिससे इस खंड के अनुसार राशि वापस करना अपेक्षित है, बैंक द्वारा उसको देय राशि में से इन राशियों को समायोजित करने के लिए बैंक को प्राधिकृत कर सकता है।

और, बशर्ते कि कोई कर्मचारी जो उक्त विनियमों के तहत पेंशन का विकल्प चुनने का पात्र था, लेकिन निर्धारित समय के भीतर उसने पेंशन का विकल्प नहीं चुना या चुना किंतु निर्धारित समय के भीतर धन वापस नहीं किया, तो उस कर्मचारी को, कर्मचारी पेंशन योजना, 1995 के तहत उसके द्वारा प्राप्त आवधिक पेंशन, यदि कोई हो, को वापस करने की आवश्यकता नहीं होगी।

(ख) 1 सितंबर, 1987 और 31 मार्च 2010 के मध्य बैंक की सेवा में था और आधिकारिक राजपत्र में उत्कल ग्रामीण बैंक (कर्मचारी) पेंशन (संशोधन) विनियम, 2024 की अधिसूचना की तारीख को या उसके बाद बैंक की सेवा में जारी रहता है, और निधि का एक सदस्य होता है या सदस्य बनता है और आधिकारिक राजपत्र में उत्कल ग्रामीण बैंक (कर्मचारी) पेंशन (संशोधन) विनियम, 2024 की अधिसूचना की तारीख से पंद्रह दिनों के भीतर, विनियम 4 में गठित निधि में बैंक के पूरे योगदान को व उस पर अर्जित ब्याज के साथ अंतरित कर जमा कर देता है या करवाता है तथा कर्मचारी पेंशन योजना 1995 के तहत उसके द्वारा प्राप्त और आधिकारिक राजपत्र में उत्कल ग्रामीण बैंक (कर्मचारी) पेंशन (संशोधन) विनियम, 2024 की अधिसूचना की तारीख से पहले किसी भी अवधि के लिए आरोपित पेंशन का भाग, यदि कोई हो, को वापस कर देता है।

(ग) 1 सितंबर, 1987 और 31 मार्च 2010 के मध्य बैंक की सेवा में था और अधिनियम की धारा 23 ए की उप-धारा (3) के खंड (बी) के तहत जिसने एक विकल्प का प्रयोग किया था या उक्त विनियमों की अधिसूचना से पहले इस्तीफा दे दिया था, दोनों ही मामलों में, 20 साल की अर्हक सेवा पूरी करने के बाद और उचित नोटिस देकर, निधि का सदस्य बनता है और आधिकारिक राजपत्र में उत्कल ग्रामीण बैंक (कर्मचारी) पेंशन (संशोधन) विनियम, 2024 की अधिसूचना की तारीख से पंद्रह दिनों के भीतर, उसके द्वारा प्राप्त संपूर्ण अंतिम राशि (कर्मचारी पेंशन योजना, 1995 के तहत व भविष्य निधि में बैंक का योगदान और राशि की प्राप्ति की तारीख तक उस पर अर्जित ब्याज) को रिफंड कर देता है और कर्मचारी पेंशन योजना, 1995 के तहत उसके द्वारा प्राप्त आवधिक पेंशन, यदि कोई हो, तो आधिकारिक राजपत्र में उत्कल ग्रामीण बैंक (कर्मचारी) पेंशन (संशोधन) विनियम, 2024 की अधिसूचना की तारीख से पहले किसी भी अवधि के लिए आरोप्य, या अनारोप्य, किसी भी स्थिति में, ऐसी राशियों की प्राप्ति की तारीख से रिफंड की तारीख तक ऐसी राशियों पर ब्याज का भुगतान करना अपेक्षित नहीं होगा।

बशर्ते कि एक कर्मचारी, जिससे इस खंड के तहत राशि वापस करना अपेक्षित है, बैंक द्वारा उसको देय राशि में से इन राशियों को समायोजित करने के लिए बैंक को प्राधिकृत कर सकता है।

(2) उप-विनियम (1) के खंड (क) और (ग) के तहत शामिल किया गया कर्मचारी का परिवार इन विनियमों के तहत पारिवारिक पेंशन का हकदार होगा, जब ऐसे दिवंगत कर्मचारी का परिवार आधिकारिक राजपत्र में उत्कल ग्रामीण बैंक (कर्मचारी) पेंशन (संशोधन) विनियम, 2024 की अधिसूचना की तारीख से तीस दिनों के भीतर, दिवंगत कर्मचारी द्वारा या यथास्थिति परिवार द्वारा प्राप्त पूरी अंतिम राशि, कर्मचारी पेंशन योजना, 1995 के तहत भविष्य निधि में बैंक का योगदान और दिवंगत कर्मचारी या यथास्थिति दिवंगत कर्मचारी के परिवार द्वारा राशि की प्राप्ति की तारीख तक उस पर अर्जित ब्याज और कर्मचारी पेंशन योजना के तहत कर्मचारी या दिवंगत कर्मचारी के परिवार द्वारा प्राप्त पेंशन या पारिवारिक पेंशन, यदि कोई हो, को रिफंड कर दिया हो या रिफंड करता हो, किंतु दोनों मामलों में प्राप्ति की तारीख से वापसी की तारीख तक ब्याज का भुगतान करना अपेक्षित नहीं होगा।

बशर्ते कि दिवंगत कर्मचारी का परिवार जिससे इस खंड के तहत राशि वापस करना अपेक्षित है, बैंक द्वारा उसको देय राशि में से इन राशियों को समायोजित करने के लिए बैंक को प्राधिकृत कर सकता है।

(3) इस विनियम में किसी बात के होते हुए भी, जो कर्मचारी 1 अप्रैल, 2010 को या उसके बाद बैंक की सेवा में शामिल हुआ है, उसे राष्ट्रीय पेंशन प्रणाली में शामिल किया जाएगा।

4. उक्त विनियमों के विनियम 20 में, उप-विनियम (1) के पश्चात्, निम्नलिखित परंतुक अंतःस्थापित किया जाएगा, नामतः -

"बशर्ते कि विनियम 3 के उप-विनियम (1) के खंड (सी) के अंतर्गत आने वाले कर्मचारियों का सेवाकाल समपहृत नहीं होगा।"

5. उक्त विनियमों के विनियम 32 में निम्नलिखित विनियम को प्रतिस्थापित किया जाएगा, नामतः -

"कतिपय कर्मचारियों के संबंध में पेंशन या पारिवारिक पेंशन का भुगतान, -

- (1) वे कर्मचारी जो 1 सितंबर 1987 और 31 अक्टूबर 1993 के मध्य बैंक की सेवा से सेवानिवृत्त हुए हैं, वे प्रभावी तारीख से पेंशन के लिए पात्र होंगे।
- (2) दिवंगत कर्मचारी, जो 1 सितंबर 1987 और 31 अक्टूबर 1993 के मध्य सेवा में था और 31 अक्टूबर 1993 से पहले उसकी मृत्यु हो गई थी, उसका परिवार प्रभावी तारीख से पारिवारिक पेंशन के भुगतान के लिए पात्र होगा।

6. उक्त विनियमों के विनियम 50 में निम्नलिखित विनियम को प्रतिस्थापित किया जाएगा, नामतः-

जिस तारीख से पेंशन देय होती है -

- (1) जिस कर्मचारी पर विनियम 32 के उप-विनियम (1), विनियम 41 या 44 के उपबंध लागू होते हैं, को छोड़कर, उत्कल ग्रामीण बैंक (कर्मचारी) पेंशन (संशोधन) विनियम, 2024 के तहत निर्धारित समय के भीतर विनियम 3 के उप-विनियम (1) के तहत निर्दिष्ट पूरी राशि को रिफंड कर देने या रिफंड किए जाने या समायोजन हेतु प्राधिकृत करने पर, पारिवारिक पेंशन को छोड़कर, उस तारीख की अगली तारीख से पेंशन देय हो जाएगी जिस तारीख को कोई कर्मचारी सेवानिवृत्त होता है या, यथास्थिति, पदत्याग करता है या अधिनियम की धारा 23 क की उपधारा (3) के खंड (ख) के तहत अंतरिती बैंक में शामिल होने का विकल्प नहीं चुनता है।

- (2) जिस कर्मचारी पर विनियम 32 के उप-विनियम (1), विनियम 41 या 44 के उपबंध लागू होते हैं, को छोड़कर, उत्कल ग्रामीण बैंक (कर्मचारी) पेंशन (संशोधन) विनियम, 2024 के तहत निर्धारित समय के भीतर विनियम 3 के उप-विनियम (2) के तहत निर्दिष्ट पूरी राशि को रिफंड कर देने या रिफंड किए जाने या समायोजन हेतु प्राधिकृत करने पर, उस तारीख की अगली तारीख से पारिवारिक पेंशन देय हो जाएगी जिस तारीख को कर्मचारी की मृत्यु होती है.
- (3) इन विनियमों में किसी बात के होते हुए भी, किसी कर्मचारी या दिवंगत कर्मचारी के परिवार के मामले में, जो उक्त विनियमों के तहत यथास्थिति पेंशन या पारिवारिक पेंशन का विकल्प चुनने के लिए पात्र था, उसने विकल्प नहीं चुना या विकल्प तो चुना किंतु पैसा रिफंड नहीं किया किंतु अब वह विनियमन (3) के उप-विनियम (1) के खंड (क) के तहत यथास्थिति, रिफंड करता है या समायोजन हेतु प्राधिकृत करता है तो वह विनियम 3 के उप-विनियम (2) के तहत उत्कल ग्रामीण बैंक (कर्मचारी) पेंशन (संशोधन) विनियम, 2024 की अधिसूचना पर या उसके बाद, उप-विनियम (1) या विनियम 3 के खंड (ग) के तहत या विनियम 3 के उप-विनियम (2) के तहत सेवानिवृत्ति या इस्तीफे की तारीख या मृत्यु, जो भी बाद में हो, से यथास्थिति रिफंड या समायोजन की तारीख से यथास्थिति पेंशन या पारिवारिक पेंशन के लिए पात्र होगा.

सूर्य कांत दाश, अध्यक्ष

[विज्ञापन-III/4/असा./582/2024-25]

**नोट :** मूल अधिसूचना सं. 533 दिनांक 24 December 2018 के भारत के राजपत्र, असाधारण, भाग III, खंड 4, के माध्यम से प्रकाशित की गई थी, दिनांक \_\_\_\_\_.

## UTKAL GRAMEEN BANK

### NOTIFICATION

Bolangir, the 5th October, 2024

**No. PER/252.**—In exercise of the powers conferred by Section 30 read with sub-section (1) of section 17 of the Regional Rural Banks Act, 1976 (21 of 1976) the Board of Directors of Utkal Grameen Bank after consultation with State Bank of India being the Sponsor Bank, and the National Bank for Agriculture and Rural Development and with the previous sanction of the Central Government, hereby makes the following regulations to amend the Utkal Grameen Bank (Employees') Pension Regulations, 2018, namely:

1. (1) These Regulations May Be Called Utkal Grameen Bank (Employees') Pension (Amendment) Regulations, 2024.
- (2) They shall come into force on the date of their publication in the Official Gazette.
2. In the Utkal Grameen Bank (Employees') Pension Regulations, 2018 (hereinafter referred to as the said regulations), in regulation 2, in sub-regulation (1), in clause (k), for the figures, letters and words "1<sup>st</sup> day of April, 2018", the figures, letters and words "1<sup>st</sup> day of November, 1993" shall be substituted.
3. In regulation 3 of the said regulations, the following regulation shall be substituted, namely:-
 

"3. Application.—(1) Any employee who –

  - (a) was in the service of the Bank between the 1st September, 1987 and the 31<sup>st</sup> March, 2010 and retired or dismissed or removed or terminated from service before the date of notification of Utkal Grameen Bank (Employees') Pension (Amendment) Regulations, 2024 and refunded or becomes a member of the Fund and refund within fifteen days from the date of notification of Utkal Grameen Bank (Employees') Pension (Amendment) Regulations, 2024 in the Official Gazette, the entire final amounts received by him

(the corpus comprising of Bank's contribution to provident fund under the Employees' Pension Scheme, 1995 and interest accrued thereon till the date of receipt by him of the amount) and the periodic pension, if any, received by him under the Employees' Pension Scheme, 1995 attributable to any period before date of notification of Utkal Grameen Bank (Employees') Pension(Amendment) Regulations, 2024 in the Official Gazette but without, in either case, requiring to pay interest on such amounts from the date of receipt of such amounts to the date of refund:

Provided that an employee who is required to refund the amounts as per this clause may authorise the Bank to adjust these amounts from the amounts payable by the Bank to the employee:

Provided further that an employee who was eligible to opt for pension under the said regulations but did not opt within the stipulated time or having opted not refunded the money within the stipulated time, the periodic pension, if any, received by him under the Employees' Pension Scheme, 1995, need not be refunded.

- (b) was in the service of the Bank between the 1<sup>st</sup>September, 1987 and the 31<sup>st</sup>March, 2010 and continue to be in the service of the Bank on or after the date of notification of **Utkal Grameen Bank** (Employees') Pension(Amendment) Regulations, 2024 in the Official Gazette, and a member or becomes member of the Fund and caused or cause to transfer the entire contribution of the Bank along with the interest accrued thereon, within fifteen days from the date of notification of Utkal Grameen Bank (Employees') Pension(Amendment) Regulations, 2024 in the Official Gazette, to the credit of the Fund constituted in regulation 4 and refund the portion of pension, if any, received by him under Employees' Pension Scheme 1995, and attributable to any period before date of notification of Utkal Grameen Bank (Employees') Pension(Amendment) Regulations, 2024 in the Official Gazette.
- (c) was in the service of the Bank between the 1<sup>st</sup>September, 1987 and the 31<sup>st</sup> March,2010 and exercised an option under clause (b) of sub-section (3) of section 23A of the Act or resigned before the notification of the said Regulations, in either case, after having completed twenty years of qualifying service and by giving proper notice, shall become member of the Fund and refund within fifteen days from the date of notification of Utkal Grameen Bank (Employees') Pension(Amendment) Regulations, 2024 in the Official Gazette, the entire final amounts received by him (the corpus comprising of Bank's contribution to provident fund under the Employees' Pension Scheme, 1995 and interest accrued thereon till the date of receipt by him of the amount) and periodic pension, if any, received by him under the Employees' Pension Scheme, 1995 attributable to any period before date of notification of Utkal Grameen Bank (Employees') Pension(Amendment) Regulations, 2024 in the Official Gazette but without, in either case, requiring to pay interest on such amounts from the date of receipt of such amounts to the date of refund:

Provided that an employee, who is required to refund the amounts, under this clause may authorise the Bank to adjust these amounts from the amounts payable by the Bank to the employee.

(2) The family of the employee covered under clauses (a) and (c) of sub-regulation (1), shall be entitled to family pension under these regulations when the family of such deceased employee refunded or refunds within thirty days from the date of notification of Utkal Grameen Bank (Employees') Pension(Amendment) Regulations, 2024 in the Official Gazette, the entire final amounts received by the deceased employee or as the case may be the family, the corpus comprising of Bank's contribution to provident fund under the Employees' Pension Scheme, 1995, and interest accrued thereon till the date of receipt of the amount by the deceased employee or, as the case may be, the family of a deceased employee and pension or family pension, if any, received by the employee or the family of the deceased employee under the Employees' Pension Scheme, 1995, but in either case without requiring to pay interest from the date of receipt to the date of refund.

Provided that a family of the deceased employee, who is required to refund the amounts under this clause may authorise the Bank to adjust these amounts from the amounts payable by the Bank to the employee.

(3) Notwithstanding anything contained in this regulation, any employee who joined the service of the Bank on or after the 1<sup>st</sup> April, 2010 shall be covered by the National Pension System".

4. In regulation 20 of the said regulations, after sub-regulation (1), the following proviso shall be inserted, namely:-

"Provided that there would no forfeiture of service for employees covered under clause (c) of sub-regulation (1) of regulation 3".

5. In regulation 32 of the said regulations, the following regulation shall be substituted namely:-

"Payment of pension or family pension in respect of certain employees.-(1) Employees who have retired from the service of the Bank between the 1<sup>st</sup>September, 1987 and the 31<sup>st</sup>October, 1993 shall be eligible for pension from the effective date.

(2) The family of a deceased employee, who was in service between the 1<sup>st</sup>September, 1987 and the 31<sup>st</sup>October, 1993 and died before the 31<sup>st</sup>October, 1993 shall be eligible for payment of family pension from the effective date”.

6. In regulation 50 of the said regulations, the following regulation shall be substituted, namely:-

“Date from which pension becomes payable.- (1) Except in the case of an employee to whom the provisions of sub-regulation (1) of regulations 32, or 41, or 44 apply a pension other than the family pension shall become payable from the date following the date on which an employee retires or, as the case may be, resigns or opts not to join the transferee bank under clause (b) of sub-section (3) of section 23A of the Act on refund or refunding or authorising adjustment of the entire amounts specified under sub-regulation (1) of regulation 3 within the time stipulated under Utkal Grameen Bank (Employees’) Pension(Amendment) Regulations, 2024.

(2) Except in the case of an employee to whom the provisions of sub-regulation (1) of regulations 32, or 41, or 44 apply, family pension shall become payable from the date following the date of death of the employee, on refunding or authorising adjustment of the entire amounts specified under sub-regulation (2) of regulation 3 within the time stipulated under Utkal Grameen Bank (Employees’) Pension(Amendment) Regulations, 2024.

(3) Notwithstanding anything contained in these regulations, in case of an employee, or as the case may be, family of the deceased employee who was eligible to opt for pension, or as the case may be, family pension under the said regulations but did not opt or opted but did not refund the money, but refunds or authorise adjustment of money under clause (a) of sub-regulation (1) of regulation (3), or as the case may be, under sub-regulation (2) of regulation 3 on or after notification of **Utkal Grameen Bank** (Employees’) Pension(Amendment) Regulations, 2024 shall be entitled for pension, family pension, or as the case may be, from date of refund or adjustment under clause (c) of sub-regulation (1) of regulation 3, or as the case may be, sub-regulation (2) of regulation 3, or the date of retirement or resignation, or death, as the case may be, whichever is later.”

SURYA KANTA DASH, Chairman  
[ADVT.-III/4/Exty./582/2024-25]

**Note:** The principal notification was published *vide* number 533 dated the December 24, 2018 in the Gazette of India, Extraordinary, Part III, section 4 date the \_\_\_\_\_.



To  
The Chairman,  
Utkal Grameen Bank,  
Head Office, Bolangir-767001

Affix joint Photograph with  
spouse duly attested by  
Branch Manager

(Single Photo for  
widower/widow applicants)

Dear Sir,

**APPLICATION FOR PENSION/FAMILY PENSION /COMPASSIONATE ALLOWANCE**

I furnish hereunder all required information / documents and request you for release of my Pension/  
Family Pension in terms of Utkal Grameen Bank (Employees') Pension Regulations, 2018.

1	Full Name of Staff in Capital Letter				
2	Cadre/Grade		3	Dt. of Birth	
4	PF A/C No.	OR/1560/	5	UAN No	
6	PAN No(.#)		7	Aadhaar No (#)	
8	Mobile No		9	Email ID(if any)	

(# Self attested Photocopies of PAN & Aadhar to be submitted)

**Additional Information for Claimant of Family Pension:**

10	Name of Claimant				
11	Relation with the Deceased Staff		12	Dt. of Birth	
13	Monthly Income(Rs)		14	Mobile No.	

15	(a) Date of Joining in Bank's service.	
	(b) Date of Retirement from Bank's service.	
	(c) Date of Death (in case of deceased)	
16	Type of Exit. (Superannuation / Death )	
17	Name of Branch / Office, where retired/expired.	
18	Period of Suspension, if any, during the service career in the Bank.	
19	Period of Break in Service (if any), due to EOL/ Suspension/ Punishment etc.	
20	Full Postal Present address with PIN for communication	

21	If, opting for commutation, specify the fraction of Pension to be commuted.			
22	(i)	Name of the <b>Pension Servicing Branch</b> of Utkal Grameen Bank, opted for	Br Code	
	(ii)	Savings Bank Account Number opened jointly with Spouse.		

23	Declaration Regarding Submission of Authorisation Letters in terms of Staff Cir.01 of 2019			
(a)	Date of Submission of <b>Format-1</b> for staff retired/ deceased after 24/12/2018		At Branch	
(b)	Date of Submission of <b>Format-2</b> for staff retired between 01/04/2018 and 23/12/2018		At Branch	
(c)	Date of Submission of <b>Format-3</b> for by family for staff deceased after 01/04/2018		At Branch	

24 I furnish hereunder details of the family members in the order of preference to receive Family Pension in the event of my death and undertake to notify Bank then and there in case of any addition or alteration in it.

Sl.	Name of the member of the family (as defined in UGB (Employees') Pension Regulations, 2018)	Date of Birth	Relationship with the employee	Remarks
(a)				
(b)				
(c)				
(d)				
(e)				

25 I hereby nominate the person named below to receive commuted value of Pension / Arrears in case of my death.

(a)	Name and Address of the Nominee	
(b)	Relationship with the Employee	
(c)	Date of Birth of the Nominee	

26 **Details of PF & Pension Withdrawal from EPFO: (\* - Mandatory)**

(A)-i	Amt of Final PF withdrawal (*)		ii	Date of Final Withdrawal. (*)	
iii	Amt of Employer's Contribution out of (a)		iv	Amt Credited to A/c No.	
v	Amt of Non refundable Advance from Employers' share, (if any)	1. 2. 3.	vi	Date of Advance	1. 2. 3.
(B)-i	Amt of EPFO Pension		ii	Date of Commencement of EPFO Pension	

iii	Whether commuted. if so, give details				
-----	---------------------------------------	--	--	--	--

The information furnished above are true and correct to the best of my knowledge and belief.

I enclose herewith the following tick (√) marked papers/ documents/ particulars for your reference.

**A-Enclosures For Pension Application by Retired Pensioner:**

1	Format-2 (Staff Cir.01 of 2019) if Format-1 submitted previously	
2	Two copies of recent passport size joint photograph with spouse without attestation. (Single Photographs in case of Widower/widow applicant)	
3	Specimen signature and personal identification mark form <b>(Form-1-A)</b> duly attested by the Branch Manager of the Pension Servicing Branch .	
4	Life Certificate & Non Employment Certificate for Retirement Pensioner (Format- 6 & 7 of Staff Cir No-01 of 2019)	
5	Undertaking letter in <b>Form-1-B</b> regarding Loans outstanding	
6	Undertaking letter in <b>Form-1-C</b> regarding provisional Refund of Employer's contribution	
7	Copy of Format-9 & Format-11 (Staff Cir.01 of 2019)	
8	Certificate on Last 10 Month's Pay & Liabilities <b>(Form-1-F)</b> from the <b>Last Branch/ Office served</b>	
9	Copy of Member Passbook downloaded from EPFO website <b>AFTER</b> final withdrawal of PF	
10	Copy of Bank Passbook page/Statement showing the credit of final withdrawal amt of PF	
11	Copy of Bank Passbook Page/Statement showing credit of latest EPFO Pension Amt.	
12	Self Attested Photocopies of PAN, Aadhaar & Bank A/c for pension	
13	Application of Commutation of pension (FORM VI / VII & VIII) affixing recent passport size single photo duly attested by the Branch Manager of the Branch having pension account.	

**B-Enclosures for Family Pension Application for Deceased Staff:**

1	Format-3 (Staff Cir.01 of 2019) if Format-1 submitted by employee by previously	
2	Format-12 (Staff Cir.01 of 2019)	
3	Copy of Death Certificate & Legal Heir Certificate Duly verified by the BM	
4	Two copies of recent passport size photograph without attestation.	
5	Specimen signature and personal identification mark form <b>(Form-1-A)</b> duly attested by the Branch Manager of the Pension Servicing Branch	
6	Life Certificate & Non Re Marriage Certificate for Family Pensioner (Format-6 & 8 of Staff Cir No-01 of 2019)	
7	Undertaking letter in Form-1-D regarding Loans outstanding	
8	Undertaking letter in Form-1-E regarding provisional Refund of Employer's contribution	
9	Certificate on Last 10 Month's Pay & Liabilities <b>(Form-1-F)</b> from the <b>Last Branch/ Office served</b>	
10	Copy of Member Passbook downloaded from EPFO website AFTER final withdrawal of PF	
11	Copy of Bank Passbook page/Statement showing the credit of final withdrawal amt of PF	
12	Copy of Bank Passbook Page/Statement showing credit of latest EPFO Pension Amt.	
13	Self Attested Aadhaar Card, PAN (Optional) & Bank A/c for Pension	

(Listed above are the papers normally required for pension settlement.)

I undertake that if some additional papers are required by the Bank specifically for my case, the same will be submitted.

Place..... Signature of the Employee/ Claimant for Family Pension  
 Date..... Name of the Employee/Claimant.....  
 Address:

UTKAL GRAMEEN BANK (EMPLOYEES') PENSION REGULATIONS, 2018

Specimen Signature of Shri / Smt. \_\_\_\_\_

Signature: 1.

2.

3.

Specimen signature attested by:

Branch Manager,  
Pension Servicing Branch with seal.

Name:  
PF No. OR/1560  
Designation:  
Branch / Office:

UTKAL GRAMEEN BANK (EMPLOYEES') PENSION REGULATIONS, 2018

Personal Identification Marks of Shri / Smt. \_\_\_\_\_

Height : \_\_\_\_\_ cms or \_\_\_\_\_ inches

Personal identification marks : 1) \_\_\_\_\_

2) \_\_\_\_\_

Branch Manager,  
Pension Servicing Branch with seal (Attesting Officer):

Name:  
PF No. OR/1560  
Designation:  
Branch / Office:

To  
The Chairman,  
Utkal Grameen Bank,  
Head Office,  
Bolangir -767001.

Dear sir,

UNDERTAKING LETTER FOR RETIRED EMPLOYEES

I, .....PF No. ....  
Cadre/Grade..... retired from .....Branch / Office  
on date .....hereby authorize Utkal Grameen Bank to deposit the  
proceeds of my PF / Pension / Pension Commutation/ Pension Arrears etc. if any, to my  
Pension SB Account No. .... with ..... Branch of  
Utkal Grameen Bank.

I am having the following staff loan accounts in my name / jointly with .....  
relationship ..... or any other loans in which the sanction stipulates that the  
remaining amount at the time of cessation of service to be recovered / closed from the  
superannuation / terminal benefits:

Sl.	Loan Account No	Loan Type	Branch
1			
2			
3			
4			
5			

(\* Please provide annexure in the above format, if number of loans exceeds the above table)

I hereby irrevocably authorize Utkal Grameen Bank to debit my above mentioned pension SB  
account and close the above furnished loan accounts / recover other dues to be payable by me  
on account of Bank's share in EPF and the fine / penalty imposed by the Disciplinary Authority,  
if any.

Yours faithfully,

Date:

Place:

(Name & Address)

Signature

To  
The Chairman,  
Utkal Grameen Bank.  
Head Office,  
Bolangir-767001.

Dear Sir,

**UNDERTAKING LETTER BY RETIRED EMPLOYEE FOR REFUND OF BANK'S SHARE IN EPF**

I, ..... PF No. ....  
Cadre/Grade ..... retired from ..... Branch / Office  
have effected Final withdrawal of PF from EPFO amounting to Rs...../-  
which was credited to my A/c no ..... with  
.....Bank on dt.....

I declare that I have never made any non-refundable withdrawal from the Employer's share of my PF a/c in any time during my service period/ have effected withdrawals from the Employer's share of my PF a/c as declared in Para No 26-A of Form-1.

As per my authorization given in Format-2, to be eligible for pension under the provisions of UGB( Employees') Pension Regulations,2018, I will refund the employer's contributions to PF withdrawn along with the non-refundable withdrawals made from the employer's share with interest upto the date of final withdrawal to the Bank. In this connection, I undertake to deposit the amount demanded by the Bank as the amount of Employer's contribution to EPFO in respect of me, arrived provisionally basing on the length of my service in the Bank, pending receipt of information from EPFO towards the exact refundable amount. I further undertake that I will arrange to deposit the amount to the account prescribed by the Bank within 30 days of the date of the Demand Letter.

I also undertake to refund the differential amount, over and above the amount deposited by me, if any, towards refund of Bank's share in EPF as and when Bank intimate me the amount on the receipt of information from EPFO towards the exact refundable amount. In the event of my failure to do so, I hereby irrevocably authorize Utkal Grameen Bank to recover said differential amount from the pension payable to me.

Yours faithfully,

Date:

Place:

Signature

Address:

(Name.....)

(To be provided by the branch/office worked last)

The General Manager-III,  
Utkal Grameen Bank,  
Head Office, Bolangir.

Letter No \_\_\_\_\_

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

Dear Sir,

**Particulars of Pay & Liabilities of Shri/Smt /Late** \_\_\_\_\_  
**Grade** \_\_\_\_\_ **PF Id** \_\_\_\_\_  
**Retired /Expired on** \_\_\_\_\_

We are furnishing below the particulars of Pay & Outstanding Liabilities of the captioned employee.

A) **Particulars of Pay:** (last 10 months prior to retirement /death)

Sl	For the Month	Basic Pay with Stagnation Increment	Spl Pay (JAIB/ CAIB-I/II)	Spl Pay (Graduate Pay)	Spl Pay (SWO-A/B)	Spl Pay (Driver/ Duftery)	Total Pay
		(a)	(b)	(c)	(d)	(e)	(a+b+c+d+e)
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
	<b>Total</b>						
	<b>Average</b>						

**(B) Particulars of Outstanding Loans & Liabilities:**

Particulars of Outstanding Loan	Account No	Balance on date
1. House Building Loan		
2. Housing Loan (Commercial Scheme)		
3. Staff Over Draft		
4. Festival Advance		
5. Education Loan		
6. Conveyance Loan		
7. Others, if any ( <i>Mention details</i> )		
<b>TOTAL LOAN BALANCE</b>		

(Additional Sheet May be added if space insufficient)

Signature of Branch Manager with seal

Branch.....



**FORMAT - 2**  
**UTKAL GRAMEEN BANK**  
**Head Office: BOLANGIR-767001 (ODISHA)**

***Option Form to be filled in by the Retired Employees of the Bank***  
***(To be submitted in quadruplicate through the Branch / Office from where retired)***

Date of receipt of application at Branch / Office		<b>FOR HO USE ONLY</b>  <b>OPTION NOTED IN SERVICE RECORD</b>   <b>(Signature of the concerned Authority at HO with date)</b>
Forwarded on		
Forwarded by		
Signature with office seal (Branch/Office)		

The Chairman  
Utkal Grameen Bank  
Head Office: Bolangir.

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

I hereby declare that I have read and understood the Utkal Grameen Bank (Employees') Pension Regulations, 2018 and I hereby voluntarily opt to become a member of the Bank's Pension Scheme and irrevocably authorise the EPFO / RPFC to transfer my entire Pension Fund kept with them to Bank to credit Pension Fund to be created for this purpose. I undertake to refund the Bank's contribution to EPF Fund together with accrued interest thereon paid to me on my retirement. I also undertake to refund my non-refundable withdrawal from EPF balance (Bank's contribution component), if any, together with interest at EPF rate from time to time.

1. Signature: \_\_\_\_\_
2. Name in Full (in Block letters): \_\_\_\_\_
3. Designation (at the time of retirement): \_\_\_\_\_
4. E P F No: \_\_\_\_\_
5. Present Residential Address: \_\_\_\_\_  
\_\_\_\_\_
6. Date of Birth: \_\_\_\_\_
7. Date of joining in the Bank' service: \_\_\_\_\_
8. Date of retiring from the Bank' service: \_\_\_\_\_
9. Branch / Office from where retired: \_\_\_\_\_ Branch / Office.
10. Branch from where pension to be drawn: \_\_\_\_\_ Branch

*Signature*

**(Signature to be attested by the Branch/Office Head with Office Seal)**





**FORMAT - 6**

..... <b>STAFF PENSION*</b> <b>(GENERAL PENSION)</b>		<b>Customer ID</b>	
..... <b>FAMILY PENSION*</b>		<b>S B A/C No</b>	

(\*Please /as applicable)

**LIFE CERTIFICATE**

***(To be submitted by the Pensioner at the time of application & once in a year in November every year)***

Certified that I have seen the pensioner.....(name)  
.....  
.....(address) holder of UGB PPO No..... and that he /she is alive on  
this day. His / Her AADHAAR No .....

(Signature of the Pensioner/Family Pensioner with date)

(Signature with office seal)

Date:.....

Name:.....

Place:.....

Designation:.....Branch: UGB,,... ..

Note: To be signed by the Pensioner / Family Pensioner in the presence of the Attesting BM of the Pension Servicing Branch



**FORMAT -7**

**Acceptance/ Non-acceptance of Commercial Employment**

I declare that I have not accepted commercial employment in India.

OR

I declare that I have accepted commercial employment in India w.e.f..... after obtaining previous sanction of the Bank and none of the conditions, if any, attached thereto by the bank has been violated.

OR

I declare that I have accepted commercial employment in India w.e.f..... without obtaining the sanction of the Bank

Date: .....

Signature of the Pensioner

**Name of the pensioner:..... PPO No:**

**SB (Pension) Account No .....Mobile :.....**

*Note: This declaration is required to be submitted for a period of two years from the date of retirement.*



**FORMAT - 9**

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***Letter of undertaking by the Pensioner***

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**The Branch Manager**

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

.....**Branch (Pension Serving Branch)**  
.....**Bank**

Dear Sir,

**Sub: Payment of Pension under PPO No. \_\_\_\_\_  
through your Branch.**

In consideration of your having, at my request, agreed to make payment of Pension due to me every month by credit to my SB Account No \_\_\_\_\_ with you I, the undersigned, agree and undertake to refund or make good any amount to which I am not entitled or any amount which may be credited to my account in excess of the amount to which I am or would be entitled. I further hereby undertake and agree to bind myself and my heirs, successors, executors, and administrators to indemnify the Bank from and against any loss suffered or incurred by the Bank in so crediting my pension to my account under the scheme and to forthwith pay the same to the Bank to recover the amount due by debit to my said Savings Bank Account or any other account belonging to me in the possession of the Bank.

Yours faithfully,

Signature in full : \_\_\_\_\_

Address (in block letters) : \_\_\_\_\_

Phone/Mobile No \_\_\_\_\_

Witness

Signature		
Name		
E.P.F No		
Address		



## FORMAT - 11

### FORM OF NOMINATION

To  
THE TRUSTEES, UTKAL GRAMEEN BANK (EMPLOYEES'S) PENSION FUND

I, \_\_\_\_\_ PPO No/ EPF No \_\_\_\_\_ hereby nominate the person(s) named below and confer on him / them the right to receive , to the extent specified below , the amount of pensionary benefits under the Pension Regulations in the event of my death before the amount become payable, or having become payable, has not been paid.

Name and address of the Nominee(s)	Relationship with the pensioner	Age	Amount of share (%)		Date of Birth	IF NOMINEE IS MINOR
			(3)	(4)		Name & address of the person who may receive the said pension during the nominee's minority
(1)	(2)		(3)	(4)	(5)	(6)

Name and address of other Nominee(s) in case the nominee under column 1 above predeceases the pensioner	Age	Relationship with the pensioner	Amount of share (%)	Date of Birth ,if the other nominee(s) is/are minor	Name & address of the person who may receive the pension during other nominee's minority	Contingency on happening of which nomination shall become invalid
(7)	(8)	(9)	(10)	(11)	(12)	(13)

This nomination supersedes the nomination made on \_\_\_\_\_ which stand cancelled.

Place: \_\_\_\_\_  
Signature / Thumb Impression (if illiterate) of Pensioner/Employee  
Date: \_\_\_\_\_ Name of Pensioner/Employee : \_\_\_\_\_

**WITNESS** :1. \_\_\_\_\_ 2. \_\_\_\_\_  
Address : \_\_\_\_\_ Address : \_\_\_\_\_

Signature  
EPF No \_\_\_\_\_

Signature  
EPF No \_\_\_\_\_

**ATTESTED** by the Pension Disbursing Branch/ Deptt. at H O / Branch

**SEAL OF ATTESTING AUTHORITY**

**NOTE:**1. If the employee has a family, the nomination shall not be in favour of any person or persons other than the members of the family. 2. If the employee has no family, the nomination may be made in favour of person or persons, or a body of individuals whether incorporated or not.. 3. Strike out which is not applicable.



**FORMAT - 13**  
**UTKAL GRAMEEN BANK**

**Head Office: BOLANGIR (CLUB PADA), P.O. BOLANGIR , Dist. BOLANGIR**

***Clearance / Pre-disbursement formalities to be furnished by  
the proposed Pension Paying Branch***

***(To be submitted by the Pension Servicing Branch while forwarding the acknowledged copy of PPO  
from Pensioner)***

01. Date of Report	
02. Name of the Pension Paying Branch	
03. Branch Code No	
04. Pensioner's name	
05. Pension Type (General or /Family Pension)	
06. UGB PPO No	
07. S B Account No (UGB Pension A/c)	
08. Date of Certificates (Please mention the Dates of the following Certificates)	
a) Life Certificate (Format-6)	
b) Non-Marriage/Re-Marriage Certificate (For Family Pensioner only)	xxxxxxxxxxxxxxxxxxxx
c) Non-Employment/Re-Employment Certificate	
d) Disability Certificate	
09. Whether Undertaking for refund of Excess Payment is taken ( Format-9)	YES / NO

**Branch Manager**

*(Please use Branch Seal)*

..... **Branch**  
..... **Bank**

Date; \_\_\_\_\_

\*Strikeout whichever is not applicable.

To  
The General Manager,  
Utkal Grameen Bank,  
Head Office, Bolangir

Sir,

I, Sri/ Smt.....  
am to inform that I have applied the Bank for pension/ family pension in respect of  
Late.....under the UGB Pension Scheme.

2- I understand that as per the UGB Pension Scheme, the amount of pension/family pension is to be reduced by the amount of monthly EPF pension/family pension. In this connection I declare that my EPF pension/family pension is yet to settled by EPFO .

3- So I request that UGB Pension may be paid to me by deducting Rs.3000/- notionally towards EPF Pension/family pension. I undertake to intimate the Bank through my Pension Serving Branch when my EPF Pension/family pension is actually settled along with the following supportive documents for refund of the excess pension/family pension deducted:

- I. Copy of PPO/Sanction Letter of EPFO
- II. Copy of Page of the Bank Passbook showing EPF Pension/Family pension credit

4. So I request the Bank to issue PPO / release monthly pension to me under UGB Pension Scheme on the basis of my above athorisation / undertaking.

Yours faithfully,

Date: (Sri/Smt..... )  
PF No.....  
(PF No. of Deceased staff in case of Family pension)

Encl: As Above

To  
The Chairman,  
Utkal Grameen Bank,  
Head Office, Bolangir-767001

Affix joint Photograph with  
spouse duly attested by  
Branch Manager

(Single Photo for  
widower/widow applicants)

Dear Sir,

**APPLICATION FOR PENSION/FAMILY PENSION /COMPASSIONATE ALLOWANCE**

I furnish hereunder all required information / documents and request you for release of my Pension/  
Family Pension in terms of Utkal Grameen Bank (Employees') Pension Regulations, 2018.

1	Full Name of Staff in Capital Letter				
2	Cadre/Grade		3	Dt. of Birth	
4	PF A/C No.	OR/1560/	5	UAN No	
6	PAN No(.#)		7	Aadhaar No (#)	
8	Mobile No		9	Email ID(if any)	

(# Self attested Photocopies of PAN & Aadhar to be submitted)

**Additional Information for Claimant of Family Pension:**

10	Name of Claimant				
11	Relation with the Deceased Staff		12	Dt. of Birth	
13	Monthly Income(Rs)		14	Mobile No.	

15	(a) Date of Joining in Bank's service.	
	(b) Date of Retirement from Bank's service.	
	(c) Date of Death (in case of deceased)	
16	Type of Exit. (Superannuation / Death )	
17	Name of Branch / Office, where retired/expired.	
18	Period of Suspension, if any, during the service career in the Bank.	
19	Period of Break in Service (if any), due to EOL/ Suspension/ Punishment etc.	
20	Full Postal Present address with PIN for communication	

21	If, opting for commutation, specify the fraction of Pension to be commuted.			
22	(i)	Name of the <b>Pension Servicing Branch</b> of Utkal Grameen Bank, opted for	Br Code	
	(ii)	Savings Bank Account Number opened jointly with Spouse.		

23	Declaration Regarding Submission of Authorisation Letters in terms of Staff Cir.01 of 2019			
(a)	Date of Submission of <b>Format-1</b> for staff retired/ deceased after 24/12/2018		At Branch	
(b)	Date of Submission of <b>Format-2</b> for staff retired between 01/04/2018 and 23/12/2018		At Branch	
(c)	Date of Submission of <b>Format-3</b> for by family for staff deceased after 01/04/2018		At Branch	

24 I furnish hereunder details of the family members in the order of preference to receive Family Pension in the event of my death and undertake to notify Bank then and there in case of any addition or alteration in it.

Sl.	Name of the member of the family (as defined in UGB (Employees') Pension Regulations, 2018)	Date of Birth	Relationship with the employee	Remarks
(a)				
(b)				
(c)				
(d)				
(e)				

25 I hereby nominate the person named below to receive commuted value of Pension / Arrears in case of my death.

(a)	Name and Address of the Nominee	
(b)	Relationship with the Employee	
(c)	Date of Birth of the Nominee	

26 **Details of PF & Pension Withdrawal from EPFO: (\* - Mandatory)**

(A)-i	Amt of Final PF withdrawal (*)		ii	Date of Final Withdrawal. (*)	
iii	Amt of Employer's Contribution out of (a)		iv	Amt Credited to A/c No.	
v	Amt of Non refundable Advance from Employers' share, (if any)	1. 2. 3.	vi	Date of Advance	1. 2. 3.
(B)-i	Amt of EPFO Pension		ii	Date of Commencement of EPFO Pension	

iii	Whether commuted. if so, give details				
-----	---------------------------------------	--	--	--	--

The information furnished above are true and correct to the best of my knowledge and belief.



I enclose herewith the following tick (√) marked papers/ documents/ particulars for your reference.

**A-Enclosures For Pension Application by Retired Pensioner:**

1	Format-2 (Staff Cir.01 of 2019) if Format-1 submitted previously	
2	Two copies of recent passport size joint photograph with spouse without attestation. (Single Photographs in case of Widower/widow applicant)	
3	Specimen signature and personal identification mark form <b>(Form-1-A)</b> duly attested by the Branch Manager of the Pension Servicing Branch .	
4	Life Certificate & Non Employment Certificate for Retirement Pensioner (Format- 6 & 7 of Staff Cir No-01 of 2019)	
5	Undertaking letter in <b>Form-1-B</b> regarding Loans outstanding	
6	Undertaking letter in <b>Form-1-C</b> regarding provisional Refund of Employer's contribution	
7	Copy of Format-9 & Format-11 (Staff Cir.01 of 2019)	
8	Certificate on Last 10 Month's Pay & Liabilities <b>(Form-1-F)</b> from the <b>Last Branch/ Office served</b>	
9	Copy of Member Passbook downloaded from EPFO website <b>AFTER</b> final withdrawal of PF	
10	Copy of Bank Passbook page/Statement showing the credit of final withdrawal amt of PF	
11	Copy of Bank Passbook Page/Statement showing credit of latest EPFO Pension Amt.	
12	Self Attested Photocopies of PAN, Aadhaar & Bank A/c for pension	
13	Application of Commutation of pension (FORM VI / VII & VIII) affixing recent passport size single photo duly attested by the Branch Manager of the Branch having pension account.	

**B-Enclosures for Family Pension Application for Deceased Staff:**

1	Format-3 (Staff Cir.01 of 2019) if Format-1 submitted by employee by previously	
2	Format-12 (Staff Cir.01 of 2019)	
3	Copy of Death Certificate & Legal Heir Certificate Duly verified by the BM	
4	Two copies of recent passport size photograph without attestation.	
5	Specimen signature and personal identification mark form <b>(Form-1-A)</b> duly attested by the Branch Manager of the Pension Servicing Branch	
6	Life Certificate & Non Re Marriage Certificate for Family Pensioner (Format-6 & 8 of Staff Cir No-01 of 2019)	
7	Undertaking letter in Form-1-D regarding Loans outstanding	
8	Undertaking letter in Form-1-E regarding provisional Refund of Employer's contribution	
9	Certificate on Last 10 Month's Pay & Liabilities <b>(Form-1-F)</b> from the <b>Last Branch/ Office served</b>	
10	Copy of Member Passbook downloaded from EPFO website <b>AFTER</b> final withdrawal of PF	
11	Copy of Bank Passbook page/Statement showing the credit of final withdrawal amt of PF	
12	Copy of Bank Passbook Page/Statement showing credit of latest EPFO Pension Amt.	
13	Self Attested Aadhaar Card, PAN (Optional) & Bank A/c for Pension	

(Listed above are the papers normally required for pension settlement.)

I undertake that if some additional papers are required by the Bank specifically for my case, the same will be submitted.

Place.....

Signature of the Employee/ Claimant for Family Pension

Date.....

Name of the Employee/Claimant.....

Address:



To  
The Chairman,  
Utkal Grameen Bank,  
Head Office,  
Bolangir -767001.

Dear Sir,

UNDERTAKING LETTER FOR FAMILY MEMBERS OF DECEASED EMPLOYEES

I, ..... eligible family member of  
late.....PF No.OR/1560/.....  
Cadre/Grade..... expired on dt.....  
at.....Branch / Office hereby authorize Utkal  
Grameen Bank to deposit the proceeds of my PF / Pension / Pension Commutation / Pension  
Arrear, if any, to my Pension SB Account No. ....  
with ..... Branch of Utkal Grameen Bank.

The deceased staff member has the following staff loan accounts in his / her name /  
singly/jointly with ..... relationship .....  
or any other loans in which the sanction stipulates that the remaining amount at the time of  
cessation of service to be recovered / closed from the superannuation / terminal benefits:

Sl.	Loan Account No	Loan Type	Branch
1			
2			
3			
4			
5			

(\* Please provide annexure in the above format, if number of loans exceeds the above table)

I hereby irrevocably authorize Utkal Grameen Bank to debit my above mentioned account and  
close the above furnished loan accounts / recover other dues to be payable by me on account  
of Bank's share in EPF and the fine / penalty imposed by the Disciplinary Authority, if any.

Yours faithfully,

Date:  
Place:

Signature

Address: (Name.....)

To  
The Chairman,  
Utkal Grameen Bank.  
Head Office,  
Bolangir-767001.

Dear Sir,

**UNDERTAKING LETTER BY FAMILY MEMBER OF DECEASED EMPLOYEE FOR REFUND OF BANK'S SHARE IN EPF**

I, .....eligible family member of  
Late.....PF No.OR/1560/.....  
Cadre/Grade ..... expired on dt.....(after superannuation on  
dt.....) from ..... Branch / Office have effected Final withdrawal of  
PF balance of Late..... from EPFO amounting to  
Rs...../- which was credited to my a/c no.....  
with .....Bank on dt.....

I declare that as per my knowledge Late..... have never made any non-refundable  
withdrawal from the Employer's share of his PF a/c in any time during his service period / have effected  
withdrawals from the Employer's share of his PF a/c as declared in Para No 26 of Form-1.

As per my authorization given in Format-3, to be eligible for pension under the provisions of UGB  
( Employees' ) Pension Regulations,2018, I will refund the employer's contributions to PF for  
Late.....withdrawn along with the non-refundable withdrawals made from  
the employer's share with interest upto the date of final withdrawal to the Bank. In this connection, I  
undertake to deposit the amount demanded by the Bank as the amount of Employer's contribution to  
EPFO in respect of Late....., arrived provisionally basing on the length of  
Late..... service in the Bank, pending receipt of information from EPFO towards  
the exact refundable amount. I further undertake that I will arrange to deposit the amount to the account  
prescribed by the Bank within 30 days of the date of the Demand Letter.

I also undertake to refund the differential amount, over and above the amount deposited by me, if any,  
towards refund of Bank's share in EPF as and when Bank intimate me the amount on the receipt of  
information from EPFO towards the exact refundable amount in respect of  
Late..... In the event of my failure to do so, I hereby irrevocably authorize Utkal  
Grameen Bank to recover said differential amount from the pension payable to me.

Date:

Place:

Signature

Address:

(Name.....)

(To be provided by the branch/office worked last)

The General Manager-III,  
Utkal Grameen Bank,  
Head Office, Bolangir.

Letter No \_\_\_\_\_

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

Dear Sir,

**Particulars of Pay & Liabilities of Shri/Smt /Late** \_\_\_\_\_  
**Grade** \_\_\_\_\_ **PF Id** \_\_\_\_\_  
**Retired /Expired on** \_\_\_\_\_

We are furnishing below the particulars of Pay & Outstanding Liabilities of the captioned employee.

A) **Particulars of Pay:** (last 10 months prior to retirement /death)

Sl	For the Month	Basic Pay with Stagnation Increment	Spl Pay (JAIIB/ CAIIB-I/II)	Spl Pay (Graduate Pay)	Spl Pay (SWO-A/B)	Spl Pay (Driver/ Duftery)	Total Pay
		(a)	(b)	(c)	(d)	(e)	(a+b+c+d+e)
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
	<b>Total</b>						
	<b>Average</b>						

**(B) Particulars of Outstanding Loans & Liabilities:**

Particulars of Outstanding Loan	Account No	Balance on date
1. House Building Loan		
2. Housing Loan (Commercial Scheme)		
3. Staff Over Draft		
4. Festival Advance		
5. Education Loan		
6. Conveyance Loan		
7. Others, if any ( <i>Mention details</i> )		
<b>TOTAL LOAN BALANCE</b>		

(Additional Sheet May be added if space insufficient)

Signature of Branch Manager with seal

Branch.....



**FORMAT - 3**  
**UTKAL GRAMEEN BANK**  
**Head Office: BOLANGIR-767001(ODISHA)**

***Option Form to be filled in by the family of those employees of the Bank who are eligible for family pension (To be submitted in quadruplicate through the Branch / Office from where retired/posted at the time of death)***

Date of receipt of application at Branch / Office	Recent photograph of the applicant to be pasted here and then to be attested by the Branch /Office Head	<b>FOR HO USE ONLY</b>
Forwarded on:		<b>OPTION NOTED IN SERVICE RECORD / EPF RECORD OF THE DECEASED EMPLOYEE</b>
Forwarded by:		
Signature with office seal (Branch/Office)		<b>(Signature of the concerned Authority at HO with date)</b>

The Chairman  
Utkal Grameen Bank  
Head Office: Bolangir\_

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

I hereby declare that I have read and understood the Utkal Grameen Bank (Employees') Pension Regulations, 2018 and I hereby voluntarily opt to become a member of the Bank's Pension Scheme and irrevocably authorize the EPFO / RPFCL to transfer my entire Pension Fund kept with them to Bank to credit Pension Fund to be created for this purpose. I undertake to refund the Bank's contribution to EPF Fund together with accrued interest thereon paid to my husband/wife/father/mother/son/daughter (delete whichever is not applicable) on his/her death while in service/after retirement from Bank's service. I also undertake to refund the non-refundable withdrawal from EPF balance (Bank's contribution component) availed by my husband/wife/father/mother/son/daughter (delete whichever is not applicable), if any, together with interest at EPF rate from time to time up to the date of retirement / death.

1. Name of the applicant/dependent of deceased employee

in Full (in Block letters): \_\_\_\_\_

2. Name of the deceased employee in Full (in block letter): \_\_\_\_\_

3. EPF No of the deceased employee: \_\_\_\_\_

4. Relationship with the deceased employee; \_\_\_\_\_

5. Name of guardian if applicant is minor; \_\_\_\_\_

**Contd....Page-2**

**FORMAT – 3 (PAGE – 2)**

6. Present Residential Address (in block letter): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

7. Date of death of the deceased employee (Documentary evidence to be attached): \_\_\_\_\_

8. Date of retirement from Bank's service: \_\_\_\_\_

9. Branch /Office last served and post held \_\_\_\_\_

10. Branch from where pension to be drawn: \_\_\_\_\_ Branch

11. List of documents / evidences to be attached:

- a) Copy of Superannuation / retirement order of the deceased employee (If applicable)
- b) Copy of Death Certificate of the Employee
- c) Copy of Birth certificate of child eligible for pension
- d) Copy of AADHAAR CARD/ KYC document in the name of applicant
- e) Any document in support of the stated relation of the applicant

(Mention the name / nature of document)

I hereby declare that what are stated in the application and documents submitted are true, correct and genuine.

Enclosures: As stated in point 11 above.

(Signature of the applicant)

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

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

**Signature attested by the Branch/Office Head with Office Seal**



**FORMAT - 6**

..... <b>STAFF PENSION*</b> <b>(GENERAL PENSION)</b>		<b>Customer ID</b>	
..... <b>FAMILY PENSION*</b>		<b>S B A/C No</b>	

(\*Please /as applicable)

**LIFE CERTIFICATE**

***(To be submitted by the Pensioner at the time of application & once in a year in November every year)***

Certified that I have seen the pensioner ..... (name)

.....

.....(address) holder of UGB PPO No..... and that he /she is alive on

this day. His / Her AADHAAR No .....

(Signature of the Pensioner/Family Pensioner with date)

(Signature with office seal)

Date:.....

Name:.....

Place:.....

Designation:.....Branch: UGB,,... ..

Note: To be signed by the Pensioner / Family Pensioner in the presence of the Attesting BM of the Pension Servicing





**FORMAT - 8**

**CERTIFICATE OF NON- REMARRIAGE / NON-MARRIAGE**  
**(APPLICABLE FOR FAMILY PENSIONERS ONLY)**

\* I hereby declare that I have not got re-married and I undertake to report the same promptly in the event of my re-marriage. (Applicable for widow / widower Family Pensioner)

\* I hereby declare that I am not married and I undertake to report the same promptly in the event of my marriage. (Applicable for un-married daughter Family Pensioner)

***(\*Please delete which is not applicable)***

Signature of the Family Pensioner:

Name of the pensioner: .....

Place :.....Date: .....

I certify to the best of my knowledge and belief the above statement is correct.

(Signature of the Bank's Officer or respectable /well known person)

Place : .....

Date : .....

Name : .....

Designation: .....

Address: .....



**FORMAT –10**

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**Letter of undertaking by the Pensioner and Family Members / Nominees**

---

---

**The Branch Manager**

.....**Branch**

.....**Bank**

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

Dear Sir,

**Sub: Payment of Pension under PPO No. \_\_\_\_\_ through your Branch**

In consideration of making payment of Pension as per the Utkal Grameen Bank Pension Regulations 2018, I / We do hereby solemnly, sincerely and conscientiously declare and say as under

I / We, hereby undertake and agree to bind myself / ourselves and my / our heirs, successors, executors, and administrators to indemnify the Bank from and against any loss suffered or incurred by the Bank in making payment as aforesaid and to forthwith pay the same to the Bank and / or adjust from the pension fund under the aforesaid Regulations and / or from any account maintained with the Bank without any notice to me/ us.

Yours faithfully,

Signature (Pensioner) ; \_\_\_\_\_

Signature of Family Members / Nominees: \_\_\_\_\_

Witness	(I)	(II)
Signature		
Name		
E.P.F No		
Address		



## FORMAT - 11

### FORM OF NOMINATION

To  
THE TRUSTEES, UTKAL GRAMEEN BANK (EMPLOYEES'S) PENSION FUND

I, \_\_\_\_\_ PPO No/ EPF No \_\_\_\_\_ hereby nominate the person(s) named below and confer on him / them the right to receive, to the extent specified below, the amount of pensionary benefits under the Pension Regulations in the event of my death before the amount become payable, or having become payable, has not been paid.

Name and address of the Nominee(s)	Relationship with the pensioner	Age	Amount of share (%)		Date of Birth	IF NOMINEE IS MINOR
			(3)	(4)		Name & address of the person who may receive the said pension during the nominee's minority
(1)	(2)		(3)	(4)	(5)	(6)

Name and address of other Nominee(s) in case the nominee under column 1 above predeceases the pensioner	Age	Relationship with the pensioner	Amount of share (%)	Date of Birth, if the other nominee(s) is/are minor	Name & address of the person who may receive the pension during other nominee's minority	Contingency on happening of which nomination shall become invalid
(7)	(8)	(9)	(10)	(11)	(12)	(13)

This nomination supersedes the nomination made on \_\_\_\_\_ which stand cancelled.

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

Signature / Thumb Impression (if illiterate) of Pensioner/Employee

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

Name of Pensioner/Employee : \_\_\_\_\_

**WITNESS** :1. \_\_\_\_\_ 2. \_\_\_\_\_

Address : \_\_\_\_\_ Address : \_\_\_\_\_

Signature  
EPF No \_\_\_\_\_

Signature  
EPF No \_\_\_\_\_

**ATTESTED** by the Pension Disbursing Branch/ Deptt. at H O / Branch

**SEAL OF ATTESTING AUTHORITY**

**NOTE:**1. If the employee has a family, the nomination shall not be in favour of any person or persons other than the members of the family. 2. If the employee has no family, the nomination may be made in favour of person or persons, or a body of individuals whether incorporated or not.. 3. Strike out which is not applicable.



**FORMAT – 12**  
**UTKAL GRAMEEN BANK**

**Head Office: BOLANGIR (CLUB PADA) , P.O. BOLANGIR , Dist. BOLANGIR**

**Application for grant of Family Pension in the event of death of Employee / Pensioner**



The Chairman  
Utkal Grameen Bank,  
Head Office: Bolangir.

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

Dear Sir,

I hereby declare that as an eligible family member to receive Family Pension in terms of Utkal Grameen Bank (Employees') Pension Regulations, 2018, I am submitting below the requisite particulars for kind favour of sanction of Family Pension to me.

1. Name of the applicant (in block letters) : \_\_\_\_\_

i) . Relation with the deceased employee/pensioner: \_\_\_\_\_

ii) . Date of Birth : \_\_\_\_\_

iii) . Name of the Guardian if the deceased Person is survived by minor child/children \_\_\_\_\_

iv) . Religion and Caste : \_\_\_\_\_

02. Present residential address of the applicant (in block letters) : \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_ Contact No \_\_\_\_\_

03. Name & age of surviving parent/widow/widower/children of the deceased employee / pensioner:

SI No	Name	Relationship with the deceased employee/pensioner	Date of Birth ( by Christian era)

04. Name of the deceased employee/pensioner \_\_\_\_\_

05. EPF No of the deceased employee : \_\_\_\_\_

06. Date of death of the employee /pensioner: \_\_\_\_\_

**(Documentary evidence to be attached) Contd. PAGE - 2**

**FORMAT – 12 (Page-2)**

07. Date of retirement (in case of Pensioner): \_\_\_\_\_

08. a) Branch/Office in which the deceased employee/  
Pensioner served last and post held by him/her \_\_\_\_\_

b) PPO No of the deceased, if any, with the nature  
of pension & Disbursing Authority. : \_\_\_\_\_

09. If the applicant is guardian, date of birth of minor  
& relationship with the deceased employee/pensioner \_\_\_\_\_

10. a) Is the applicant (other than guardian) a pensioner ? **YES / NO**

if so, indicate the amount of monthly pension : \_\_\_\_\_

b) Is the applicant employed? If so, particulars **YES / NO**  
in details with last pay drawn certificate from employer :

11. Description of the applicant including (a) Height \_\_\_\_\_cm

(b) Personal Identification marks, if any, on hand, face etc. \_\_\_\_\_

12. Signature/LTI \*\* of the applicant (Duly  
Attested by the Branch head with seal) \_\_\_\_\_

**SIGNATURE / LTI OF THE APPLICANT  
IS ATTESTED**

**(Signature of the Branch Head with Seal)**

13. a) Name of the Branch of the Bank through which  
Family Pension is to be drawn : \_\_\_\_\_

b) SB Account No : \_\_\_\_\_

14. List of Documents / evidence attached :

a) Three copies of passport size recent photograph of the applicant , duly attested in front side

b) Attested copy of the Death Certificate of the deceased Employee/ Pensioner

c) Birth Certificate of the children eligible for pension.

d) Any other document(s) indicating that the applicant is a genuine claimant e.g. AADHAAR Card,  
Voter Card etc.

15. I hereby declare that what are stated in this application and documents submitted herewith are true,  
correct and genuine.

Yours faithfully,

\_\_\_\_\_  
Signature/LTI of the applicant

**\*\* To be furnished in case the applicant is not literate enough to sign his/her name or unable to sign due to poor health  
condition which also needs submission of Medical Certificate.**

To  
The General Manager,  
Utkal Grameen Bank,  
Head Office, Bolangir

Sir,

I, Sri/ Smt.....  
am to inform that I have applied the Bank for pension/ family pension in respect of  
Late..... under the UGB Pension Scheme.

2- I understand that as per the UGB Pension Scheme, the amount of pension/family pension is to be reduced by the amount of monthly EPF pension/family pension. In this connection I declare that my EPF pension/family pension is yet to settled by EPFO .

3- So I request that UGB Pension may be paid to me by deducting Rs.3000/- notionally towards EPF Pension/family pension. I undertake to intimate the Bank through my Pension Serving Branch when my EPF Pension/family pension is actually settled along with the following supportive documents for refund of the excess pension/family pension deducted:

- I. Copy of PPO/Sanction Letter of EPFO
- II. Copy of Page of the Bank Passbook showing EPF Pension/Family pension credit

4. So I request the Bank to issue PPO / release monthly pension to me under UGB Pension Scheme on the basis of my above athorisation / undertaking.

Yours faithfully,

Date: (Sri/Smt.....)  
PF No.....  
(PF No. of Deceased staff in case of Family pension)

Encl: As Above

To  
The Chairman,  
Utkal Grameen Bank,  
Bolangir.

Sub: Application for Pension/Compassionate Allowance (Regulation 29/31 of the UGB Pension Regulation, 2018

Respected Sir,

In view of the Letter No.F.No.8/20/2020-RRB Dated 03/10/2024 of DFS, Ministry of Finance, Govt. of India and in anticipation to the amendment of the UGB Pension Regulation, 2018, I herewith submit my application in the prescribed formats for pension and request you to sanction pension/compassionate allowance in my favour.

In this connection, I hereby authorize the Bank to adjust the amount refundable to the Bank (towards Employer's contribution to CPF withdrawn by me) from the arrears of pension payable to me/us.

Further, since this submission is being made long time after my exit from the Bank, I undertake to submit/comply with deficiency in submission, if any and I request that my application may be accepted pending compliance of the same.

Yours faithfully,

(Signature )

Name Sri/Smt.....

Grade-.....

PF Id- 1560/1535/2689/2881/.....  
(UGB) (KPGb) (KAGB) (RGB)

Encl-Application set

To  
The Chairman,  
Utkal Grameen Bank,  
Bolangir.

Sub: Application for Pension/Family Pension

Respected Sir,

In view of the Letter No.F.No.8/20/2020-RRB Dated 03/10/2024 of DFS, Ministry of Finance, Govt. of India and in anticipation to the amendment of the UGB Pension Regulation, 2018, I/we herewith submit my/our application in the prescribed formats for pension and request you to sanction pension/family pension in my/our favour.

In this connection, I/we hereby authorize the Bank to adjust the amount refundable to the Bank (towards Employer's contribution to EPF withdrawn by me/employee/legal heirs) from the arrears of pension payable to me/us.

Further, since this submission is being made long time after my exit from the Bank, I/We undertake to submit/comply with deficiency in submission, if any and I/we request that my/our application may be accepted pending compliance of the same.

Yours faithfully,

(Signature of Spouse/Legal Heirs)

Name of Spouse/Legal Heirs 1-.....

2- .....

3-.....

Name of Deceased Employee Late.....

Grade-.....

PF Id- 1560/1535/2689/2881/.....  
(UGB) (KPGB) (KAGB) (RGB)

Encl-Application set



To  
The Chairman,  
Utkal Grameen Bank,  
Bolangir.

Sub: Application for Pension

Respected Sir,

In view of the Letter No.F.No.8/20/2020-RRB Dated 03/10/2024 of DFS, Ministry of Finance, Govt. of India and in anticipation to the amendment of the UGB Pension Regulation, 2018, I herewith submit my application in the prescribed formats for pension and request you to sanction pension in my favour.

In this connection, I hereby authorize the Bank to adjust the amount refundable to the Bank (towards Employer's contribution to EPF withdrawn by me) from the arrears of pension payable to me.

Further, since this submission is being made long time after my exit from the Bank, I undertake to submit/comply with deficiency in submission, if any and I request that my application may be accepted pending compliance of the same.

Yours faithfully,

(Signature)

Name- Sri/ Smt.....

Grade-.....

PF Id- 1560/1535/2689/2881/.....  
(UGB) (KPGB) (KAGB) (RGB)

Encl-Application set



**Form VII**

[See regulation 39 (9)]

Name of the Bank : Utkal Grameen Bank

**Application for Commutation of Pension subject to Medical Examination**

(to be submitted in duplicated)

**PART - I**

Space for  
Affixing  
attested  
passport  
size  
photograph

To  
Designated Authority

Dear Sir,

I desire to commute a fraction of my pension in accordance with \_\_\_\_\_ Bank (Employee's) Pension Regulations, 2018. An attested copy of my photograph is affixed on the application and an unattested copy is enclosed.

The necessary particulars are furnished below:

1. Name in full (in block letters) : \_\_\_\_\_
2. Designation at the time of retirement : \_\_\_\_\_
3. Name of Office/Department from which retired : \_\_\_\_\_
4. Date of birth (as per Bank's Service Record) : \_\_\_\_\_
5. Date of Retirement : \_\_\_\_\_
6. Class of Pension : \_\_\_\_\_
7. Fraction of Pension proposed to be commuted not exceeding 1/3<sup>rd</sup> thereof : \_\_\_\_\_
8. Preference for station where medical examination is desired to take place : \_\_\_\_\_

Place :

Date :

\_\_\_\_\_  
Signature

Address : \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Acknowledgement**

Received from Shri/Smt/Kum. \_\_\_\_\_

\_\_\_\_\_ application for commutation of Pension.

(Former Designation)

Place :

Date :

\_\_\_\_\_  
(Signature of Designated Authority)

To  
The General Manager,  
Utkal Grameen Bank,  
Head Office,  
Bolangir.

(Through the BM/RM, Utkal Grameen Bank, \_\_\_\_\_ Branch/Office)

Dear Sir

With due regards we would like to inform you that Late \_\_\_\_\_,  
who worked as \_\_\_\_\_ at \_\_\_\_\_ branch of  
Utkal Grameen Bank expired on \_\_\_\_\_ leaving behind the following  
dependent members of his family.

Sl	Full Name	Relation	Age
1			
2			
3			
4			

We, as the legal heirs of Late \_\_\_\_\_ request  
you to kindly arrange to the release the Pension/Pension Arrear/Compassionate allowances available to the  
deceased staff of the Bank and Ex-gratia so that we can sustain financially.

We request that the required forms for claiming the Pension/Pension Arrear/Compassionate  
allowances may please be sent to us and we seek kind cooperation and guidance of the Branch  
/Regional Office for submitting the claim papers.

Further we also request that the loans availed by late \_\_\_\_\_, if any,  
from the Bank or any other financial institution may be adjusted from the Pension/Pension Arrear/  
Compassionate allowances.

Yours faithfully,

Dated- \_\_\_\_\_

(Sri/Smt \_\_\_\_\_.)

(Sri/Smt \_\_\_\_\_)

(Smt/Smt \_\_\_\_\_)

(Smt/Smt \_\_\_\_\_)

Address for Communication:

\_\_\_\_\_  
At- \_\_\_\_\_,  
P.O- \_\_\_\_\_,  
Dist- \_\_\_\_\_,  
PIN- \_\_\_\_\_,  
Mobile No- \_\_\_\_\_.

**Affidavit**

We, \_\_\_\_\_ w/o \_\_\_\_\_ aged around \_\_\_\_\_ years  
, \_\_\_\_\_ s/o \_\_\_\_\_ aged around \_\_\_\_\_ years,  
\_\_\_\_\_ s/o \_\_\_\_\_ aged around \_\_\_\_\_ years  
all residents of village \_\_\_\_\_ of \_\_\_\_\_ G.P  
under \_\_\_\_\_ P.S of \_\_\_\_\_ District do solemnly swear the  
following.

(details of all legal heirs)

That Late \_\_\_\_\_ s/o \_\_\_\_\_  
who was working in Utkal Grameen Bank, \_\_\_\_\_ branch expired on  
\_\_\_\_\_ and we, as his/her legal heirs, are submitting claims for the  
Pension/Pension Arrear/Compassionate allowances. We declare that the documents/papers  
etc that we are submitting in support of the claims are true and genuine to the best of our  
knowledge.

We further authorize the Bank to deduct/adjust the outstanding loans, if any, availed by  
Late \_\_\_\_\_ from the Bank or from any Financial  
Institution with Bank's permission from the proceeds of the Pension/Pension  
Arrear/Compassionate allowances.

We have no objection whatsoever if the Pension/Pension Arrear/Compassionate  
allowances are paid to Sri/Smt \_\_\_\_\_ s/w of \_\_\_\_\_  
\_\_\_\_\_ and we authorize Sri/Smt \_\_\_\_\_  
to receive the Pension/Pension Arrear/Compassionate allowances on our behalf.

Signature of All legal heirs.

**Note:**

1. This is a sample draft of affidavit and additional details to be inserted wherever necessary.
2. Para No-3 to be inserted for Disclaimer for all claims except for Ex-Gratia claim for which the specific format is prescribed i.e Annex-III