

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 Pension Servicing Branch 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 Format-1 for staff retired/ deceased after 24/12/2018		At Branch	
(b)	Date of Submission of Format-2 for staff retired between 01/04/2018 and 23/12/2018		At Branch	
(c)	Date of Submission of Format-3 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	
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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 (Form-1-A) 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 Form-1-B regarding Loans outstanding	
6	Undertaking letter in Form-1-C 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 (Form-1-F) from the Last Branch/ Office served	
9	Copy of Member Passbook downloaded from EPFO website AFTER 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 (Form-1-A) 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 (Form-1-F) from the Last Branch/ Office served	
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 fromBranch / Office
 on datehereby 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							
	Total						
	Average						

(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>)		
TOTAL LOAN BALANCE		

(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		FOR HO USE ONLY OPTION NOTED IN SERVICE RECORD (Signature of the concerned Authority at HO with date)
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

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

(*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 NoMobile :.....

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



FORMAT - 9

Letter of undertaking by the Pensioner

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