

## **Documents required for commencement of Family pension for Central Government Pensioners (Civil, Defence and Railways)**

**Family Pensioner to visit any nearest IDBI Bank Branch and submit the following documents:**

### **1).In case of Joint Account of Service Pensioner with Spouse:**

- a. Death Certificate of service Pensioner
- b. BH recommendation for commencement of Family Pension (Annexure –I)
- c. Life Certificate of Family pensioners (Annexure-II)
- d. PAN card of Family Pensioner
- e. Aadhaar Card of Family Pensioner
- f. Nomination Form A (Annexure-III)
- g. PPO (Pension Payment Order)
- h. Specimen Letter of Undertaking By the Family Pensioner ( Annexure-IV)

### **2).In case of Individual Account of Service Pensioner (Not Jointly):**

- a. Death Certificate of service Pensioner
- b. BH recommendation for commencement of Family Pension (Annexure –I)
- c. Life Certificate of Family pensioners (Annexure-II)
- d. PAN card of Family Pensioner
- e. Aadhaar Card of Family Pensioner
- f. Form 14 ( Annexure-V)
- g. Descriptive Roll
- h. Nomination Form A (Annexure-III)
- i. PPO (Pension Payment Order)
- j. Specimen Letter of Undertaking By the Family Pensioner ( Annexure-IV)
- k. Cancelled Cheque /Statement of Account/Passbook of family Pensioner

**3).** On receipt of required documents, conversion of Service Pension to Family Pension is done by CPPC and acknowledgement is sent to family pensioner on the registered mobile number.

**4).** Pension of Family Pensioner is paid within 30 days after receipt of the required documents.

### **Note:**

1. Details of the family pensioners KYC (Aadhaar and PAN) should be same as per PPO.

Annexure –I  
BH recommendation for commencement of Family Pension

From  SOL  ID:  Name of Branch:  Postal address:	To  Central Pension Processing Cell, GBG Operations, 6 <sup>th</sup> Floor, Annex Building,  IDBI Bank Ltd,  Sector 11, Plot 39-41, CBD Belapur,  Navi Mumbai, Maharashtra – 400614.
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**Recommendation for commencement family pension**

PPO No.		
Pension Authority/Dept from where the deceased pensioner/ family pensioner was drawing pension		
Date of death of pensioner		
Whether regular pension has been stopped	Yes/No	If yes, since when? (month and year)
Name of family pensioner(s)		
Whether family pensioner (Spouse) has a joint a/c with the pensioner in IDBI Bank?	Yes/No	If Yes, Mention the joint a/c number.  If No, open an SB a/c with IDBI bank and mention the a/c Number.

It is hereby recommended for commencement of family pension as per the attached application. It is certified that the branch is satisfied with the documents provided and it complies with the Circular and guidelines on **Expeditious Settlement of family pension cases.**

**Signature with date & Seal of BH Name &**

**EIN of BH:**

Annexure-II

**ANNUAL CERTIFICATES TO BE SUBMITTED BY PENSIONER**

**A. LIFE CERTIFICATE**

Certified that I have seen the pensioner Shri/Smt./Ms. \_\_\_\_\_  
holder of Pension Payment Order No. \_\_\_\_\_ and that he/she is alive on this  
Date.

1. Present address of the pensioner / Family pensioner.

\_\_\_\_\_

2. Telephone / Mobile Number: \_\_\_\_\_

3. E-mail ID: \_\_\_\_\_

Signature & Designation (BH/ Manager and above) of Authorized Officer Seal

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

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

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

**B. NON-EMPLOYMENT / RE-EMPLOYMENT CERTIFICATE**

1. I declare that I have been employed / re-employed in the Offices which is a part of / financed  
by \_\_\_\_\_ and was in receipt of the following monthly rates of  
Emoluments during the year ended November, 20 or during the month of within the said year:

(a) Pay \_\_\_\_\_

(b) Special Pay \_\_\_\_\_

(c) Other Allowances/ Fees/ Honorarium \_\_\_\_\_

(it includes D.A., A.D.A., these to be shown clearly)

Further, that the orders of my re-employment do/do not stipulate my pension being held in abeyance during the re-employment period.

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

OR

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

OR

I declare that I have accepted Commercial Employment in India without obtaining the sanction of Central Govt. (NOTE: This declaration is required to be given for a period of two years from the date of retirement.)

2. I declare that I have not accepted any employment under a Govt. outside India /an International Organization of which Govt. of India is not a member.

OR

I declare that I have accepted employment under a Govt. outside India/an International Organization of which Govt. of India is not a member after obtaining the previous sanction of the Central Government and none of the conditions attached thereto by the Govt. has been deviated from.

OR

I declare that I have accepted employment under a Govt. outside India/an International Organization of which Govt. of India is not a member, without obtaining the previous sanction of the Central Govt. of which Govt. of India is not a member, without obtaining the previous sanction of the Central Govt.

Signature of the Pensioner

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

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

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

P.P.O. No. : \_\_\_\_\_

**C. CERTIFICATE OF RE-MARRIAGE / MARRIAGE**

I hereby declare that I am not married/ I have not been re-married during the past six months and shall inform the bank as soon as I marry/re-marry.

Signature of the Pensioner

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

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

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

P.P.O. No. : \_\_\_\_\_

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

Signature of a responsible Officer or a well-known person

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

Name \_\_\_\_\_

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

Designation \_\_\_\_\_

**D. Details to be furnished by the Pensioner**

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

Bank Account No : \_\_\_\_\_

Address for Correspondence: \_\_\_\_\_

Telephone No : \_\_\_\_\_

Mobile No : \_\_\_\_\_

Aadhaar No : \_\_\_\_\_

Email Id : \_\_\_\_\_

Pan : \_\_\_\_\_

Name of the Spouse: \_\_\_\_\_

Spouse Date of Birth: \_\_\_\_\_

Signature of the Pensioner

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**ACKNOWLEDGEMENT**

Life Certificate of Pensioner / Family Pensioner of Shri/Smt/Ms. \_\_\_\_\_

Holder of Pension Payment Order No. \_\_\_\_\_ has been received.

Date:

Signature.....

Name .....

Stamp of the receiving Bank

Branch/PDA Address of Bank/PDATel

Annexure-III  
Nomination Form A

(To be submitted in triplicate)

**Form A**

**(Common Nomination Form for Arrears of Pension and Commutation of Pension)**

[See Rule 5 of Payment of Arrears of Pension (Nomination) Rules, 1983 and Rule 7 of

Central Civil Services (Commutation of Pension) Rules, 1981]

I, ..... hereby nominate the person/ persons mentioned below and confer on him/her/them the right to receive in the event of my death, to the extent specified below, amount on account of the following:

- i. Arrears of Pension
- ii. Commuted Value of Pension payable under Central Civil Services (Commutation of Pension) Rules, 1981

Name, date of birth (DOB) and address of the nominee	Relationship with employee/pensioner	Share to be paid to each	If nominee is minor, name, DOB and address of person who may receive the amount on behalf of minor	Name, DOB and address of alternate nominee in case the nominee under Column (1) predeceases the employee/pensioner	Relationship with employee/pensioner	Name, DOB and address of person who may receive the amount if alternate nominee in Col. (5) is a minor	Contingency on happening of which nomination shall become invalid
1	2	3	4	5	6	7	8

These nominations supersede any nominations made by me earlier.

Place:

Signature of Government servant/Pensioner

Date:

Contact No.

**Note 1 :** Completely strike out the benefit for which nomination is not intended to be made. Separate copies of this nomination Form may be used for nominating different persons for benefits (i) and (ii) above.

**Note 2 :** The Government servant shall draw lines across the blank space below the last entry to prevent the insertion of any name after he/she has signed. The nominee(s)/alternate nominee(s)' shares together should cover the whole amount.

Annexure-IV

**SPECIMEN LETTER OF UNDERTAKING BY THE PENSIONER**

Date \_\_\_\_\_

To

The Branch Manager

\_\_\_\_\_ (Bank)

\_\_\_\_\_ (Branch & address)

Dear Sir,

Payment of pension under P.P.O. No. \_\_\_\_\_ through your office.

In consideration of your having, at my request, agreed to make payment of pension due to me every month by credit to my account 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, successor, 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 and also irrevocably authorize the bank to recover the amount due by debit to my said account or any other account/ deposits belonging to me in the possession of the bank.

Yours faithfully,

Signature:

Name:

Address

**Witnesses:**

(1) Signature:

(2) Signature:

Name:

Name:

Address:

Address:

Date:

Date:



**Annexure-V**

**DESCRIPTIVE ROLL OF CLAIMANT**

Particulars of Height and Personal Identification Marks in respect of .....  
(Claimant name)

HEIGHT : Feet: Inches: :

IDENTIFICATION MARKS in respect of (Claimant name)

1.

2.

SPECIMEN SIGNATURE in respect of (Claimant name)

1.

2.

3.

Signature of Claimant (name)

:

Place:

Date:

**DESCRIPTIVE ROLL OF CLAIMANT**

Particulars of Height and Personal Identification Marks in respect of..... (Claimant name)

I. HEIGHT : Feet: Inches:  
:

I. IDENTIFICATION MARKS :-

- 1.
- 2.

I. Thumb and Finger impressions in respect of  
(Claimant name)

<b>LEFT HAND</b>		<b>RIGHT HAND</b>	
<b>THUMB</b>		<b>THUMB</b>	
<b>FIRST FINGER</b>		<b>FIRST FINGER</b>	
<b>SECOND FINGER</b>		<b>SECOND FINGER</b>	
<b>THIRD FINGER</b>		<b>THIRD FINGER</b>	
<b>FOURTH FINGER</b>		<b>FOURTH FINGER</b>	

Signature of the (Claimant name) Name:

Place:

Date:

LATEST PHOTOGRAPH OF (INDIVIDUAL) (Claimant)

Name:



Signature of Claimant

(Name)

Place :

Date : .....

**SPECIMEN SIGNATURES/DESCRIPTIVE ROLL OF CLAIMANT**

SPECIMEN SIGNATURE in respect of (Claimant name):

1.

2.

3.

Place:

Date:

**1. Personal details:**

1. Name of the Pensioner
2. Designation
3. Date of Retirement
4. Address of the Pensioner

**Family Pensioners only:-**

5. Relationship with deceased:
6. Name of the Family Pensioner:

**2. Bank Details:**

7. Saving / Current Account No.
8. Name of the Bank :
9. Name of the Branch :

The rights conferred and the duties imposed on the Bank by Law and/or norm and/or regulations.

Signature of the Bank Manager (Bank Accounts Seal)

### **Enclosures:**

- (i)** Two specimen signatures of the applicant or left hand thumb impression\* duly attested (to be furnished in two separate sheets)
- (ii)** Two copies of passport size photograph of the applicant, dully attested.
- (iii)** Descriptive Roll of the applicant duly attested by Gazetted Government Servant in duplicate indicating height and personal marks, if any, on the hand, face etc. (Specify at least two conspicuous marks)
- (iv)** Certificate(s) of age, two attested copies, showing the dates of birth of the children. The certificate should be from the local panchayat or from the Head of a recognized school if the child is studying in such school. (This information should be furnished in respect of such child or children the particulars of whose date of birth are not available with the Head Office.)
- (v)** Details of family in form 3.
- (vi)** Undertaking for refunding any excess payment made by the pension Disbursing Bank
- (vii)** Specimen Signature or Left hand thumb and finger impressions of the guardian duly attested in the case of guardian who is not literate enough to sign his/her name
- (viii)** Copy of the PPO of the previous pensioner/ Family Pensioner
- (ix)** Two attested copies of the passport size of photograph of the guardian /nominee
- (x)** Descriptive Roll of the guardian/Nominee duly attested by Gazetted Government Servant in duplicate indicating height and personal marks, if any, on the hand, face etc.
- (xi)** Proof of permanent address of the guardian.
- (xii)** Copy of death certificate of the deceased employees or pensioner/previous family pensioner if applicable.
- (xiii)** Copy of document regarding ineligibility of previous family pensioner if applicable.

NOTE: Attestation should be done by two Gazetted Government officials or two or more persons of respectability in the town, village or paragana in which the applicant resides.