

**CHECK-LIST OF DOCUMENTS TO BE SUBMITTED**  
**Family Pension / Spouse or Child Claim**

<b><u>SNO</u></b>	<b><u>DOCUMENT</u></b>	<b><u>Attached</u></b>
1)	Annexure F-1 Application form for Family Pension	
2)	Annexure F-2 Family Pensioner's Profile in duplicate with photograph	
3)	Annexure F-3 Duly signed by Branch / Zonal Official	
4)	Annexure F-4 Non-marriage/re-marriage Declaration	
5)	Annexure F-5 Non-marriage certificate by Daughter / son	
6)	Annexure F-6 Non-employment/re-employment certificate	
7)	Death certificate of deceased Staff and his/her spouse, if family applicant is child / Guardian of child if any	
8)	KYC Documents/Date of Birth Proof, of all other children including applicant is Child	
9)	Guardianship Certificate / Affidavit-duly notaries along with Bank's panel Advocate's opinion certificate stating if certificate's contents are sufficient to protect Bank's interest (in case of Minor applicant)	
10)	Medical certificate by Bank's approved Doctor, if child applicant is more than 25 years Age and physically disabled / disability of mind	
11)	Branch Manager should ensure and certify that such disabled child is not able to earn his live hood and unmarried	
12)	In case of Civil Death-Certificate issued by Hon'ble Court in case of Absconding Employee ; copy of police report / certificate	







(TO BE FILLED BY THE BRANCH / OFFICE)

BANK OF INDIA

REF.NO. F -

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

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

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

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

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

(Attending Office)

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

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

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

**II. Details of Emoluments Actually Drawn / payable for the month prior to the date of retirement / death**

Last Month / Year	Basic Pay (Including Stagnation Increments)(Rs.)	Special Pay (Only For Award Staff) (Rs.)	ALLOWANCES DRAWN		CCA reckoned for PF Award Staff only (Rs.)	Officiating Allowance (Rs.)
			Graduation Pay / PQP (Rs.)	Fixed Personal Pay (Rs.)		
Actual Salary Drawn						
Payable for the last month						
<b>TOTAL</b>						

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

III. **CERTIFICATE**

We certify that,

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

Branch Recommendation endorsed

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

**Zonal Manager**

**Chief Manager / Manager**

Name \_\_\_\_\_

\_\_\_\_\_ **Zone**

\_\_\_\_\_ **Branch**

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

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

Date :

Date :

Branch Seal :

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

ANNEXURE F-4

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

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The Assistant General Manager /  
The Chief Manager / Manager

\_\_\_\_\_ Branch

**My Pension Account**

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

Place :

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

Date :

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

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**Certificate from Branch Officer**

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

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

Place :

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

Date :

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

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

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

ANNEXURE F-5

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

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The Assistant General Manager /  
The Chief Manager

\_\_\_\_\_ Branch

I hereby declare that I am not married.

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

Place :

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

Date :

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

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The Assistant General Manager /  
The Chief Manager

\_\_\_\_\_ Branch

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

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

Place :

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

Date :

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

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

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

ANNEXURE F-6

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

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

Signature

Date :  
Name :  
Pension Reference :  
Address :

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**Certificate from Branch Officer**

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

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

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

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

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

APPLICATION FORM FOR CLAIMING ASSISTANCE BY NOMINEE- BOI STAFF BENEVOLENT SCHEME ( BRANCH CIRCULAR 87/183 DATED 20.11.1993)

THE GENERAL MANAGER  
BANK OF INDIA  
HEAD OFFICE  
HR DEPARTMENT ( MUMBAI)  
[HeadOffice.Staffsalary@bankofindia.co.in](mailto:HeadOffice.Staffsalary@bankofindia.co.in)

DEAR SIR,

**BOI STAFF BENEVOLENT SCHEME**

Shri/Smt/Ms \_\_\_\_\_ was a member of  
**(Name of the deceased )**

**BOI STAFF BENEVOLENT SCHEME.**

2. Shri/Smt/Ms \_\_\_\_\_ EXPIRED

ON \_\_\_\_\_

(Original copy of death Certificate duly verified is enclosed)

3. I \_\_\_\_\_ nominee ( \_\_\_\_\_ )  
(Nominee) (Relationship)

Request you to pay me the financial assistance in terms of the scheme.

Yours faithfully,

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

Place

Date

Contact Number

Address

Email ID( if any)

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CERTIFICATE FROM ZONAL OFFICE

We certify that Shri/Smt/Ms \_\_\_\_\_ was a member of **BOI STAFF BENEVOLENT SCHEME. Original application for membership submitted by Shri/Smt/Ms \_\_\_\_\_ is enclosed . We recommend payment of financial assistance to the nominee in terms of Branch Circular No. 87/183 dated 20.11.1993 ( or in terms of modified scheme vide Branch Circular 111/126 17.07.2017) Note : ( In cases, if Original application for membership is not available then check the membership from HRMS and confirm and attach salary slip where membership is mentioned as YES )**

**Zonal Manager**  
\_\_\_\_\_ **Zone**

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SPCE FOR USE OF **HEAD OFFICE**

CLAIM RECEIVED ON

CLAIM SENT ON

STAMPED RECEIPT RECEIVED ON