



UCO BANK
Head Office-2
Personnel Services Department
Pension Cell

**3 & 4 DD Block, Sector -1, Salt Lake
Kolkata-700064**

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TO ALL BRANCHES & OFFICES IN INDIA

Sub: Simplification of Family Pension claim Format

The existing Family Pension procedure has been revisited in order to make the entire process hassle free. Accordingly a simplified Family Pension Claim Format has been devised.

Existing Procedure

As per existing provisions for settlement of family pension claims the following documents / papers as per applicability are to be submitted to Head Office for processing of family pension.

| S.No. | Existing Documents sought for family pension payment |
|--------------|---|
| 1 | Family Pension application(PEN-11) in 3 sets dully filled by Claimant and attested by the Branch Head |
| 2 | Attested copy of the Death Certificate issued by competent authority |
| 3 | Two copies of descriptive rolls /Identification marks of Family pensioner dully attested by branch head. |
| 4 | Latest two passport size photograph of spouse/nominee/claimant |
| 5 | Salary particulars for the last 10 months i.e, for ten moths immediately prior to death of the employee, duly attested |
| 6 | A certificate of No dues of the employee to the Bank regarding outstanding loans duly certified |
| 7 | Two copies of Birth certificate of the children of the deceased employee, who may be eligible for family pension |
| 8 | An affidavit duly affirmed by all the legal heirs of deceased pensioner in original retaining copy at the branch |
| 9 | An agreement as per the format, executed by widow/widower and other legal hairs of deceased pensioner (indemnity Bond), if deceased pensioner is an ex-serviceman prior to joining bank furnishing the option. |
| 10 | Declaration in the form of an affidavit stating that monthly income of the Claimant from all sources do not exceed Rs.3500/-, Age Proof, and confirmation of unmarried Status, (only in the case of daughter) required only if the Clairnant is the daughter/Son/ parent of the deceased. |

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Revised Procedure:

Now in order to make the entire process hassle free we have devised simplified family pension Formats in place of existing formats, which are as under;

1. **Format of Family Declaration (Annexure –A)** : to be obtained from the existing employees at the time of their superannuation
2. **single page Family Pension Application (Annexure – B)**: to be obtained from the claimant of Family Pension

We herewith enclose specimen of revised formats (Annexure-A & B) which are also available in UCO Online. Branches/ Offices may download the formats, and provide to the employees / claimants of Family Pension as and when required.

All the Branches and Offices are advised to obtain **Format of Family Declaration (Annexure –A)** from the existing employees at the time of their superannuation.

For submission of claims of family pension Branches/ Offices are advised to obtain 3 sets of **single page Family Pension Application (Annexure – B)** from the claimants along with its enclosures.

On receipt of Annexure-B Branches/ Offices should forward one set to Head Office, Pension Cell after due attestation at their end and 2nd set to their respective Zonal Office while retaining the third set for their record.

For any further clarification you may contact Pension cell, Head Office, PSD.


Deputy General Manager
Personnel Services

Encl: As above

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FAMILY DECLARATION

To
The Trustees
UCO Bank employees Pension Fund
Kolkata

I Sri....., hereunder submitting the particulars of my dependent family members for the purpose of settling my retirement benefits;

(1)Shri/Smt.....Date of Birth.....(.....relation)_____ of
Sri_____ by creed_____ by Nationality_____ by
occupation_____ residing at.....

(2)Shri/Smt.....Date of Birth.....(relation)_____ of
Sri_____ by creed_____ by Nationality_____ by
occupation_____ residing at.....

(3)Shri/Smt.....Date of Birth.....(relation)_____ of
Sri_____ by creed_____ by Nationality_____ by
occupation_____ residing at.....

I hereby confirm that there is no other dependent family member other than above mentioned.

Yours faithfully

Signature of the Employee

Name of the employee:

EMPNo:

Date:

Witness:

1.

2.



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TO BE SUBMITTED BY THE SPOUSE/ CLAIMANT

ANNEXURE - B

Affix latest
Passport size
Photo of
Claimant, with
Branch
Manager's
Attestation

APPLICATION FOR THE FAMILY PENSION ON THE DEATH OF PENSIONER

1. Name of the applicant :
 - i) Widow/ Widower/Son/Daughter/Parent :
(Within Sl.No.1(i) & (ii) Strike out whichever is not applicable)
 - ii) Guardian, relationship with deceased employee
(If the deceased person is Survived by minor child/
or minor children)

Height, and Prominent Identification marks
on the face, hands, etc.

2. Name, relationship and date of birth of surviving widow/ widower
and children of the deceased employee/pensioner

| Sl No | Name | Relationship with deceased pensioner | Date of birth | Age |
|-------|------|--------------------------------------|---------------|-----|
|-------|------|--------------------------------------|---------------|-----|

- 1.
- 2.
- 3.

3. Name of deceased : 4. EMP No:
5. Date of death of the Employee/ Pensioner :
(Copy of Death Certificate duly certified by the Branch Head should be enclosed herewith)
6. Branch/Office (in which the deceased Employee/pensioner served last) :
7. If the applicant is a guardian- Date of Birth of minor and relationship with the deceased employee/pensioner :
8. If the applicant is employed give particulars :
9. Full address of the applicant :
10. Name of Branch with code for payment of family pension :
11. SB A/c. No. of the Applicant :

I undertake to repay/authorize you to recover from the pension/family pension/ Commutation payable to me on the death of the above pensioner any amount that may be due from him/her to the Bank.

Date.....

.....
(Signature or left/right thumb
Impression of the applicant)

Attested by Branch Head :
With Name, Emp. Number and seal

Contact No. : Mobile /Land line

Required only if the Claimant is the Son/Daughter of the deceased:
(Declaration in the form of affidavit stating that monthly income of the Claimant from all sources does not exceed Rs.3,500/-p m, proof of Age and confirmation of unmarried status.

In case of parent:
Certificate of Income(i.e.,dose not exceed Rs.3,500/- pm)