



Serial No. 1082

Circular No. CIRCLTR/2014 - 15/121

DEPT: FINANCE AND ACCOUNTS DEPT

Date: 27-11-2014

ALL BRANCHES AND
ADMINISTRATIVE OFFICES.

**Subject : OBTENTION OF LIFE CERTIFICATE AND OTHER DOCUMENTS FROM STAFF
PENSIONERS / FAMILY PENSIONERS AT BRANCHES**

Please refer to Head Office circular No.PER/2009-10/91 dated 22.01.2010 and PER/2009-10/39 dated 30.07.2009 and PER/2006-07/24 dated 29.06.2006 which contains the instructions for obtention of Life Certificate and other documents from all classes of Staff Pensioners. The instructions contained in the said Circulars will remain unchanged.

Now, it is decided to accept Life Certificate from the Staff Pensioners at any Branch irrespective of pension payment branch and the Branch accepting the certificates has to upload the same in the system at the site <http://10.263.40.41> i.e go to ITS Department 41 site, login with MIS ID—go to Apps/ Utilities—RETURNS—SBH Pensioners Life Certificate. The branches are advised to take prudent precaution while attesting / feeding life certificate in the system as the branches will continue to be responsible for its genuineness. Branches in general and Non –home branches in particular have to ensure the following before entering the Life Certificate in the system.

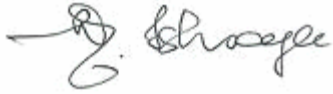
- i) The Life Certificate, non-remarriage certificate and non-employment certificate as per format available in the 41 site under “SBH Pensioners Life Certificate-Download Certificate “ have to be obtained by the Branches, duly signed by the Branch Manger / Authorized Official. His seal should be affixed thereon.
- ii) Life Certificate should be obtained and entered in the system only **after seeing** the pensioner in person and establishing his / her identity beyond doubt, verifying with the signature and photograph already available in the Bank’s records like CBS/Pass Book. The same may also be verified with the Retired Employee Identity card issued by the Bank to the pensioners.

The certificates so obtained are to be kept in a separate file for future verification by the Controlling Authority. The Inspecting Officials (Mobile duty) will also verify these during the course of audit. However, for ready reference, we furnish hereunder the list of documents to be obtained from the pensioners / family pensioners :

- a) Letter of indemnity duly executed by the pensioner / family pensioner at the time of first release of Pension.
- b) Life Certificate to be obtained from all classes of pensioners at the time of First Payment and subsequently in the month of November every year.
- c) In the case of Family Pension, non-remarriage certificate to be obtained at the time of first payment and subsequently in the month of November every year.
- d) Evidence of age in the case of family pension payable to a child/children of the deceased pensioner at the time of first payment and in the month of November every year.
- e) Non-marriage certificate in the case of unmarried daughter at the time of first payment and in the month of November every year.
- f) Certificate of non-acceptance of commercial employment without obtaining previous sanction of the Bank.
- g) In the case of child/children suffering from any disorder or disability, certificate of evidence to that effect from a medical officer approved by the Bank, at the time of first family pension and subsequently in the month of November every year.
- h) Certificate in respect of such of the disabled child/children on monthly basis, on the following lines,

- 1)He or She has not started earning any livelihood.
- 2)In the case of daughter that she was not yet married.

Please bring the contents of this circular to the notice of all staff working at the branch and the staff pensioners / family pensioners drawing pension from the branches.

A handwritten signature in black ink, appearing to read 'J. Shree'.

Deputy General Manager(F&A).