SCHEME FOR COMPASSIONATE APPOINTMENT TO A DEPENDENT FAMILY MEMBER OF A DECEASED EMPLOYEE/EMPLOYEE RETIRED ON MEDICAL GROUNDS DUE TO INCAPACITATION BEFORE REACHING THE AGE OF 55 YEARS – RETENTION OF THE SCHEME FOR PAYMENT OF EX- GRATIA LUMP SUM AMOUNT

(Source: PAD CIRCULAR NO. 244 dated 03.01.15)

The Board in its meeting held on 23.12.2014 decided to reintroduce the scheme of ex-gratia (discontinued since 05.08.2014), along with the scheme of appointment on compassionate grounds. Both the schemes viz. the Scheme for Compassionate Appointment & the Scheme for Payment of Ex-gratia Lump sum Amount, shall remain in operation, with provision that benefit under either of the two schemes is available to the dependents of the deceased employees subject to their eligibility for the same. However, the option for Payment of Lump sum Ex-gratia Amount can be used only when the other conditions of compassionate appointment are met.

Gist of both the schemes are given below:

**REVISED SCHEME FOR PAYMENT OF EX-GRATIA (LUMP-SUM) AMOUNT**
(Source: HRD Circular No.433 dated 03.11.07)

**ELIGIBILITY TO SEEK FINANCIAL ASSISTANCE UNDER THE SCHEME:**

**APPLICABLE UNDER THE FOLLOWING CIRCUMSTANCES:**

i. Employee dying in harness (other than due to injuries sustained while performing official duty as a result of violence, terrorism, robbery or dacoity);

ii. Employee dying due to injury sustained while performing official duty within or outside office premises (other than due to injuries sustained while performing official duty as a result of violence, terrorism, robbery or dacoity);

iii. Employee Sanctioned Premature Retirement by the competent authority owing to incapacitation on medical grounds, before reaching the age of 55 Years.

iv. However, the family of an employee who dies in harness due to injuries sustained while performing official duty as a result of violence, terrorism, robbery or dacoity, would also have the option to apply for financial assistance under this scheme, if they so desire.

**PROCEDURE:**

Claims under the Scheme of Ex-Gratia (lump-sum) amount would be considered only on receipt of written request for the same on the prescribed proforma appended with this circular. Such request, among other criteria, would also be examined keeping in view the past record of the employee. Other criterions applicable with regard to the procedure for application are:
i. In case of pre-mature death of employees dying in harness:

Such requests should be received from the family by the Bank within a period of 6 months from the date of death of the employee.

ii. Where an employee seeks pre-mature retirement owing to incapacitation on medical grounds before reaching the age of 55 years, payment of Ex-Gratia would be considered subject to the following conditions:

- a. On receipt of an application, the Bank will constitute a Medical Board. On the basis of the report of the Medical Board, the Competent Authority will take a decision on the application.

- b. In cases of pre-mature retirement owing to medical incapacitation, the application for sanction of Ex-Gratia should be received by the Bank within a period of 60 days of date of retirement.

**AMOUNT OF EX-GRATIA PAYABLE UNDER THE SCHEME:**

If otherwise eligible to seek assistance under the scheme, the family of an employee may be considered for receiving this assistance where the total monthly income of the family arrived, as per calculation shown below, is less than 60% of the last drawn notional gross salary of the employee (net of notional taxes) for the complete month, during which he/she has expired or has been approved for premature retirement owing to incapacitation on medical grounds.

In such cases, the amount of Ex-Gratia payable shall be equivalent to 60% of the last drawn notional gross salary (net of notional taxes), payable for each month of remaining notional service of the employee (i.e. up to the notional age of normal superannuation in terms of extant service rules / conditions) at the time of his death / incapacitation, subject to cadre-wise ceiling of “Maximum Amount” as follows:

<table>
<thead>
<tr>
<th>Category</th>
<th>Maximum Amount Payable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Officers</td>
<td>Rs.8.00 lakhs</td>
</tr>
<tr>
<td>Clerical Staff</td>
<td>Rs.7.00 lakhs</td>
</tr>
<tr>
<td>Subordinate Staff</td>
<td>Rs.6.00 lakhs</td>
</tr>
</tbody>
</table>

**CALCULATION OF MONTHLY INCOME:**

A) Amounts received under terminal benefits:

- i) Provident Fund
- ii) Gratuity
- iii) Leave Encashment
- iv) Any other amount paid under a scheme of the Bank.

**SUB-TOTAL (a):**

B) Liabilities to the bank:

- i) Loans taken from bank and/or Other Financial institutions with prior approval of the Bank

**SUB-TOTAL (b):**
C) **Net Corpus of Terminal Benefits:** \( c = a-b \):

D) **Investments:**
   i. Deposits
   ii. NSCs
   iii. PPF
   iv. LIC policies
   v. Any Other

**SUB-TOTAL (d):**

E) Details of Moveable property, if any, held and monthly income derived there from:

F) Details of Immoveable property, if any, held and monthly income derived there from:

G) **Monthly income of the family from all sources**:
   i) Notional monthly income from interest at Bank’s maximum term deposit rate as applicable as on the date of death of the employee, on the net corpus of terminal benefits received :
   
   ii) Notional monthly income from investments Based on notional monthly interest at Bank’s maximum term deposit rate as applicable as on the date of death of the employee, on the net corpus of terminal benefits received :
   
   iii) Monthly income from movable and Immovable property :
   
   iv) Monthly income of family Members :
   
   v) Any other monthly income :

   **Total Monthly income of the family** :_______

**OTHER GUIDELINES APPLICABLE**

Ex-Gratia (lumpsum amount) is payable only if all the extant provisions for such retirement are fully satisfied and the said pre-mature retirement has been duly approved by the competent authority before the employee attaining 55 years of age.

In cases where disciplinary action had been taken / was pending against the employee dying in harness or where the deceased employee was involved in financial irregularities, embezzlement of funds, committing of frauds etc., Bank will continue to abide by the guidelines issued by the Government of India requiring consideration and decision in each case by the Board of the Bank.

Ex-Gratia (lumpsum) amount shall be payable within 3 months of receipt of application at Head Office. Assistance under the Scheme of Ex-Gratia is not an entitlement but may be granted in deserving and eligible cases only at the sole discretion of the bank, keeping in view the financial conditions of the family.
APPLICATION FOR SANCTION OF EX-GRATIA
(TO BE FILLED AND SIGNED BY APPLICANT FROM FAMILY OF DECEASED EMPLOYEE)

Date: ______

THE GENERAL MANAGER
PUNJAB NATIONAL BANK
HRD DIVISION
HO : NEW DELHI.

REQUEST FOR SANCTION OF EX-GRATIA
(To be submitted in Duplicate)

I, ______________________ (relation) __________ of Late Shri/Smt./Km. __________, who was employed as __________ at PNB BO/RO/ZO/HO: __________ has expired on __________ while in the service of the Bank. I hereby submit my request for being considered under the Revised Scheme for Payment of Ex-Gratia (lump-sum) Amount in lieu of Employment on Compassionate Grounds, in terms of the Scheme circulated vide HRD Circular No. _______ dated _______.

In this regard I submit as under:-

1. I, hereby state that none of my children / parents / brother / sister (please strike out whichever is not required) is/are in employment or engaged in any other business / occupation.

   OR

I, hereby state that although Mr. / Ms. ______________________ my son / daughter / brother / sister, is/ are in employment or is / are engaged in the business as per details given below, but taking into account the circumstances of my case, i.e. the income and assets & liabilities of the family (as defined under the scheme), I request the bank to sanction Ex- Gratia amount on account of death of my spouse / father / mother / son / daughter.

2. Particulars of the family and related information thereof is as under:-

A. PARTICULARS OF THE DECEASED EMPLOYEE :

   a) Name : 
   b) PF No : 
   c) Designation : 
   d) Last posting : 
   e) Region/Zone :
f) Date of Birth : 

g) Date of joining the Bank : 

h) Date of Death : 

i) Cause of Death : 

j) Category : SC / ST / OBC / GEN. 

k) Whether pension optee : Yes / No 

l) Whether in receipt of pension from any other source (If specify) : 

B. PARTICULARS OF FAMILY MEMBERS

<table>
<thead>
<tr>
<th>Name</th>
<th>Relationship with deceased</th>
<th>Age (in completed Yrs.)</th>
<th>Educational Qualifications</th>
<th>Marital Status</th>
<th>Whether employed / in Business</th>
<th>Income per month (in Rs.)</th>
</tr>
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</tbody>
</table>

C. DETAILS OF ASSETS & LIABILITIES

I) Immovable Properties :

i) House Properties :

(a) No. of House Properties :

(b) Address(es) thereof :

(c) Whether self occupied :

(d) Monthly Income, thereon :

(e) Market Value :

ii) Landed Property

(a) No. of Plots/farmland owned by the Deceased employee & family members :
(b) Details with addresses:

(c) Monthly Income, thereon:

II) Details of **Moveable property**:

Monthly income there from, if any:

D) Details of dues settled by Bank:

<table>
<thead>
<tr>
<th>Dues (Payable/paid)</th>
<th>Amount (In Rupees)</th>
<th>Outstanding Loans (including intt. payable as on date of expiry of Employee)</th>
<th>Amount (In Rupees)</th>
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<td>Any other Loan with Bank’s permission (please specify)</td>
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<td>H/L Waivement</td>
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<td>Any other amount recoverable from the employee (please specify)</td>
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<td>Others, if any (please specify)</td>
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<td>Amount paid, if any, towards adjustment of an o/s loan a/c out of terminal dues, where deceased employee was a guarantor/co-borrower (eg. Education loan etc)</td>
<td></td>
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<tr>
<td><strong>TOTAL (A)</strong></td>
<td><strong>TOTAL (B)</strong></td>
<td></td>
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</tbody>
</table>

NET AMOUNT RECEIVED FROM BANK (A-B):
E) Details of Amounts Received/Receivable from Other Sources:
(All investments to be reported as on date of death)

<table>
<thead>
<tr>
<th>Details</th>
<th>Amount (In Rupees)</th>
<th>Amount of Loan there against, if any (In Rupees)</th>
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<td>LIC:</td>
<td>Sum assured:</td>
<td></td>
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<tr>
<td></td>
<td>Amount settled:</td>
<td></td>
</tr>
<tr>
<td>Accident Insurance: Amt. Settled (apart from Bank’s Group Insurance Policy)</td>
<td>Sum assured:</td>
<td></td>
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<tr>
<td></td>
<td>Amount settled:</td>
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<tr>
<td>Bonds:</td>
<td>Face Value:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Amt. payable / due:</td>
<td></td>
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<tr>
<td>Shares:</td>
<td>No. of shares:</td>
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<td>Name of the co:</td>
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<td>Market value per share:</td>
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<td>Total value of shares:</td>
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<td>Any other Investment (please specify)</td>
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<tr>
<td>TOTAL (A)</td>
<td></td>
<td>TOTAL (B)</td>
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</table>

NET AMOUNT RECEIVED FROM OTHER SOURCES / INVESTMENTS (A-B):
F. DETAILS OF MONTHLY FAMILY INCOME INCL. PENSION:

(a) Family Pension (Break-up as Basic+ DA)
(b) Army Pension (Break-up as Basic+ DA)
(c) Pension from Insurance Co., if any
(d) Income of family members
   Employed or engaged in business
UNDEARTAKING

I hereby affirm that the particulars furnished above are true and undertake that in case the information is found to be incorrect, I undertake to refund to the bank the amount of payment received under the scheme of Ex- Gratia (lump-sum) amount. I further undertake, that this application is being moved by the undersigned on behalf of the family of Late Shri/Smt/Km._____ who was in the employment of the Bank.

(Signature of applicant)

Name: ______________________

Date: __________ Address: ______________________

Place: __________

________________________

________________________
The Scheme covers all cases where death of the employee occurs on or after 05.08.2014.

The coverage is available to a dependent family member of a permanent employee of the Bank who -

(a) dies while in service (including death by suicide)

(b) is retired on medical grounds due to incapacitation before reaching the age of 55 years. (Incapacitation is to be certified by a duly appointed Medical Board in a Government Medical College/Government District Head Quarter Hospitals/Panel of Doctors nominated by the Bank for the purpose).

(c) where disciplinary action was pending against the deceased employee/employee retired on medical grounds or if the deceased employee was involved in serious financial irregularities, embezzlement of funds, committing frauds, etc., bank will continue to abide by Bank’s guidelines.

Dependent family members means spouse; or wholly dependent son (including legally adopted son); or wholly dependent daughter (including legally adopted daughter); or wholly dependent brother or sister in the case of unmarried employee.

The appointment shall be made in the clerical and sub-staff cadre only.

The family is indigent and deserves immediate assistance for relief from financial destitution; and applicant for compassionate appointment should be eligible and suitable for the post in all respects under the provisions of the relevant Recruitment Rules.

Compassionate Appointment under the Scheme are exempted from Normal Recruitment Procedure i.e., without the agency of selection like IBPS/Employment Exchange, Recruitment Board of Bank, etc. and the ban orders on filling up of posts issued by Government of India or any controlling authority.

Upper age limit may be relaxed wherever found to be necessary. The lower age limit should, however, in no case be relaxed below 18 years of age from the date of application.

Application for employment under the Scheme from eligible dependent should normally be considered upto five years from the date of death or retirement on medical grounds and decision to be taken on merit in each case.

However, Bank can consider request for compassionate appointment even when the death or retirement on medical grounds of the employee took place long back. Examination of such cases would call for a great deal of circumspection. The decision to
make appointment on compassionate grounds in such cases be taken only at the Board level.

Appointment on compassionate grounds shall be made only on regular basis and that too, only if regular vacancies meant for that purpose are available. Compassionate appointment shall be made upto a maximum of 5% of vacancies falling under direct recruitment quota in clerical cadre or vacancies identified in the sub-staff category. The Bank shall hold back 5% of vacancies in the aforesaid categories to be filled by appointment on compassionate grounds.

Widow appointed on compassionate ground upon re-marriage will be allowed to continue in service, even after re-marriage.

In deserving cases, even when there is already an earning member in the family, a dependent family member may be considered for compassionate appointment with the prior approval of the competent authority of the bank who, before approving such appointment, will satisfy himself that grant of compassionate appointment is justified, having regard to the number of dependents, assets and liabilities left by the employee, income of the earning member as also his liabilities including the fact that the earning member is residing with the family of the employee and whether he should not be a source of support to other members of the family.

Cases of missing employees are also covered under the scheme for compassionate appointment subject to the following conditions:-

A request to grant the benefit of compassionate appointment can be considered only after a lapse of at least 2 years from the date from which the Employee has been missing, provided that: (i) an FIR to this effect has been lodged with the Police and the results of the Police investigation should also be taken into account; (ii) the missing person is not traceable, and (iii) the competent authority feels that the case is genuine;

This benefit will not be applicable to the case of an Employee (i) who had less than two years to retire on the date from which he has been missing; or (ii) who is suspected to have committed fraud, or suspected to have joined any terrorist organisation or suspected to have gone abroad.

Compasionate appointment in the case of a missing employee also would not be a matter of right as in the case of others and it will be subject to fulfilment of all the conditions, including the availability of vacancy, laid down for such appointment under the scheme;

It is not the intention to restrict employment of a family member of the deceased or medically retired sub-staff employee to an erstwhile sub-staff post only. As such, a family member of such erstwhile sub-staff employee can be
appointed to a clerical post for which he/she is educationally qualified, provided a vacancy in clerical post exists for this purpose.

An application for compassionate appointment shall, however, not be rejected merely on the ground that the family of the employee has received the benefits under the various welfare schemes. While considering a request for appointment on compassionate ground a balanced and objective assessment of the financial condition of the family shall be made taking into account its assets and liabilities (including the benefits received under the various welfare schemes mentioned above) and all other relevant factors such as the presence of an earning member, size of the family etc.

Compassionate appointment shall be made available to the person concerned if there is a vacancy meant for compassionate appointment and he or she is found eligible and suitable under the scheme.

Compassionate appointment will have precedence over absorption of surplus employees and regularization of temporary employees.
ANNEXURE II

APPLICATION FOR EMPLOYMENT IN THE BANK
ON COMPASSIONATE GROUNDS
(TO BE FILLED AND SIGNED BY APPLICANT FROM FAMILY OF DECEASED EMPLOYEE)

(TO BE SUBMITTED IN DUPLICATE)

Date______________

THE GENERAL MANAGER
PUNJAB NATIONAL BANK
PERSONNEL ADMN.
DIVISON HO : BHIKAIJI
CAMA PLACE NEW DELHI.

A. PARTICULARS OF THE APPLICANT:

1. Name of the Applicant : 

2. Date of Birth : 

3. a. Place of birth :
   b. State which he/she belongs to :

4. Details of deceased employee in whose place employment is being sought:
   a. Name :
   b. PF No. :
   c. Designation :
   d. Date of Birth :
   e. Last place of posting :
   f. Circle :
g. Category: SC/ST/OBC/Gen : 

h. Date of Death/Retirement : on medical grounds 

i. Cause of death : 

j. Total length of service rendered : 

k. Whether permanent employee : 

5. Relationship with the deceased : Employee 

6. a. Details of Educational Qualifications:

<table>
<thead>
<tr>
<th>Name of the examination passed</th>
<th>Year of passing</th>
<th>Name of the School/college</th>
<th>Subjects studied</th>
<th>% of marks obtained</th>
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b. Other qualifications, if any, with details thereof : 

7. Past experience, if any, with details : 

B. PARTICULARS OF ALL DEPENDANT FAMILY MEMBERS OF THE DECEASED EMPLOYEE (If some are employed, their income and whether they are living together or separately) 

<table>
<thead>
<tr>
<th>Name</th>
<th>Relationship with deceased employee</th>
<th>Age (in complete d Yrs.)</th>
<th>Educational Qualifications</th>
<th>Address</th>
<th>Marital Status</th>
<th>Employed or not (if employed, particulars of employment and whether living together or separately)</th>
<th>Income per month (in Rs.)</th>
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</table>
C. DETAILS OF ASSETS & LIABILITIES AND INCOME

I) Immovable Properties :
   i) House Property :
      (a) No. of House Properties :
      (b) Address(es) thereof :
      (c) Whether self occupied :
      (d) Monthly Income, thereon :
      (e) Market Value :
   ii) Landed Property :
      (a) No. of Plots/farmland owned by the
          Deceased employee and family members:
      (b) Details with addresses:
      (c) Monthly Income, thereon:

II) Details of Moveable property :
    Monthly income thereof, if any :

D) Details of dues settled by Bank :

<table>
<thead>
<tr>
<th>Dues (Payable/paid)</th>
<th>Amount (Rs.)</th>
<th>Outstanding Loans (including intt. payable as on date of death of Employee)</th>
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TOTAL (A)  TOTAL (B)
E) Details of Amounts Received/Receivable from Other Sources :
( All investments to be reported as on date of death )

<table>
<thead>
<tr>
<th>Details of Investments</th>
<th>Amount (in Rupees)</th>
<th>Amount of Loan there against, if any (in Rupees)</th>
</tr>
</thead>
<tbody>
<tr>
<td>LIC:</td>
<td>Sum assured:</td>
<td></td>
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<tr>
<td>(For all the policies payable on the death of the deceased employee)</td>
<td>Amount settled:</td>
<td></td>
</tr>
<tr>
<td>Accident Insurance:</td>
<td>Sum assured:</td>
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</tr>
<tr>
<td>Amt. Settled (apart from Bank’s Group Insurance Policy)</td>
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<tr>
<td>Bonds :</td>
<td>No. of shares:</td>
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<td>Name of the co:</td>
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<td>Market value per share:</td>
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<td></td>
<td>Total value of shares:</td>
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</tr>
<tr>
<td>Shares :</td>
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<tr>
<td>Any other Investment (please specify)</td>
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<tr>
<td>TOTAL (A)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL (B)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
NET AMOUNT RECEIVED FROM OTHER SOURCES / INVESTMENTS (A-B) :

F. DETAILS OF MONTHLY FAMILY INCOME INCL. PENSION:

(a) Family Pension (Break-up as Basic+ DA)
(b) Army Pension (Break-up as Basic+ DA)
(c) Pension from Insurance Co., if any
(d) Income of family members
    Employed or engaged in business

DECLARATION AND UNDERTAKING

1. I hereby declare that the facts given by me above are, to the best of my knowledge, correct. If any of the facts herein mentioned are found to be incorrect or false at a future date, my services may be terminated.

2. I hereby also declare that I shall maintain properly the other family members who were dependent on the deceased employee as mentioned in this form and in case it is proved at any time that the said family members are being neglected or not being properly maintained by me, my appointment may be terminated.

Date: __________________________
Signature of the applicant
Name: __________________________
Address: _________________________
Tel. No. __________________________
E-mail __________________________

Shri/Smt/Kum __________________________ is known to me and the facts mentioned by him/her are correct and verified by me.

Date: __________________________
Signature of witness*
Name: __________________________
Address: _________________________
Tel. No. __________________________
E-mail __________________________

*Either any employee in the Senior level of the Bank or Gazetted rank official from State/Central Government.
ANNEXURE II-A

(TO BE SUBMITTED IN DUPLICATE)

THE GENERAL MANAGER
PUNJAB NATIONAL BANK
PERSONNEL ADMN. DIVISON,
HO : BHIKAJI CAMA PLACE
NEW DELHI.

Dear Sir,

REQUEST FOR EMPLOYMENT ON COMPASSIONATE GROUNDS TO MY SON/DAUGHTER

I, ________________________, ________________ of Late Shri / Smt. ________________________, who was employed as ___________ at ______________ and died on __________, while in service of the Bank, request that my application for employment on compassionate grounds in Bank’s service may be considered favourably.

Or

I hereby declare that I am not interested / am not in a position to accept employment on compassionate grounds in Bank’s service. Hence I nominate my son / daughter, namely ________________________, whose application dated __________ seeking employment in the bank on compassionate grounds is enclosed, may be considered favorably.

And / Or
I hereby state that although my son / daughter namely __________________________ is / are in employment* / engaged in business / profession#, but taking into account the circumstances of my case, i.e. the income of the son / daughter already employed, the size of the family, the assets and liabilities of the family etc., as per details given in the enclosed application, I request the bank to give employment to my son / daughter nominated by me.

I declare that the particulars furnished above and in the application submitted by Shri / Smt. / Ms.__________________________, who has been nominated by me, are true. I undertake that in case any information so furnished is found to be incorrect, services of the applicant nominated by me may be dispensed with.

Yours faithfully,

Date:
Place:

(Signature)
Name & Address
Phone/Mobile No.__________

NOTE : 1. * Please enclose salary certificate(s), proof of income,

2. # State nature of business / profession,

3. Strike off whichever is not applicable & furnish details deemed necessary