

## **PF / LIC CLAIM, LOAN AND TRANSFER FORMS : CHECKLIST**

**INCOMPLETE FORMS WILL BE RETURNED WITH  
DISCREPANCY TICKED POINTWISE AS UNDER**

### **PF / EPS / EDLI CLAIMS**

1. For PF/ Pension/ EDLI/ Loan form no unsigned form will be accepted - **please sign on Each Page of the form under the caption “Member’s/ Claimant’s Signature” & Under “Declaration of Unemployment” Page 2 of PF/ EPS Forms**
2. Please affix Re1 revenue stamp on all withdrawal / loan forms **and sign across the stamp**
3. Please **attach a latest Bank statement and one crossed cheque** along with the PF claim and loan forms
4. To receive monthly Pension open account in Axis Bank/ HDFC Bank/ ICICI Bank or any other pension designated Bank
5. To receive monthly Pension provide 5 joint photographs of yourself with spouse and 2 children under 25 years and also provide the DOB certificate of children under 25 years
6. Once you start receiving monthly pension ensure that you submit a Life Certificate to the Bank on 1<sup>st</sup> November each year otherwise your pension will be stopped by the PF office
7. Christian Members are required to provide Guardianship certificate for minor children under Christian law.
8. For Housing Loan attach declaration form along with other documents such as search report, sale agreement, title deed etc.
9. For PF Transfer you are responsible for collecting documents for PF transfer from your previous employer- Form 3A / Form 10 / NRS
10. International Workers’ forms to be submitted 3 months in advance of their departure from India
11. International Worker Passport copy required along with form.
12. Please download, print, sign all applicable forms and send them to the PF co-coordinator
13. For EDLI Claim original death certificate is required.

### **INSTRUCTIONS FOR PF TRANSFER**

- 1. Fill Up the Feedback Form and email to the co-ordinator**
- 2. Furnish the name,contact number and email id of the previous company's co-ordinator to the present company**
- 3. Collect the following documents from your previous employer- your pro-active involvement is required**
  - a. Form 3A/ 7PS for 2 prior years**

### **INSTRUCTIONS FOR LIC GRATUITY / SUPERANNUATION CLAIMS**

1. Affix Re1 revenue stamp and sign across the stamp
2. Attach ECS Mandate Form for Superannuation
3. Mention pension option & commutation option clearly by ticking
4. Attach PAN Card Copy
5. Attach Crossed Cheque