

**BARODA GUJARAT GRAMIN BANK**

(Sponsored &amp; Wholly Owned by Govt. of India, Govt. of Gujarat &amp; Bank Of Baroda)

(Scheduled Bank)

**बड़ौदा गुजरात ग्रामीण बैंक**

(भारत सरकार, गुजरात सरकार एवं बैंक ऑफ बड़ौदा का सम्पूर्ण स्वामित्व)

(शिडयूल्ड बैंक)

**ANNEXURE – I****STANDARD OPERATING PROCEDURE :**

**Action by applicant :** The resigned / compulsorily retired / Eligible Family members I case of death of the resigned / compulsorily retired staff to visit any Branch within area of operation of Baroda Gujarat Gramin Bank from where he/she wish to draw pension/family pension sanctioned having complied pension regulation , need to submit in quadruplicate [4] in original, following documents on or before 03-10-2024.

**List of documents to be submitted for pension / family pension**

SN	Particular of Form/Document	Pension	Family Pension
1	ANNEXURE	ANNEXURE: III,IV	ANNEXURE:III,IV
2	Option form	Format-2	Format-3
3	Salary certificate	Format-4 [last 10 months]	Format-4 [last 1 months]
4	Life certificate	Format-6	Format-6
5	Non-employment/Non-marriage	Format-7	Format-8
6	Undertaking	Format-9,10	Format-10
7	Form of Nomination	Format-11	Format-11
8	Application	Format – 1/ANNEX-II	Format-12
9	Proposed pension paying branch clearance	Format-13	Format-13
10	KYC DOCUMENTS	PAN Card Adhar Card Voter Id Card	PAN Card Adhar Card Voter Id Card
11	Bank Provident Fund Contribution : EPFO PF Passbook &/or certified Bank account passbook displaying PF Credit entry	Yes	Yes
12	Pension under EPS,1995 from EPFO : Attach copy of bank account passbook displaying credit entries for pension under EPS,1995/PPO issued by EPFO	Yes	Yes
13	Notarized Affidavit declaring amount of withdrawal made from Bank PF share	Yes	Yes
14	Bank account passbook compulsorily with branch of BGGB	Yes(Joint with spouse)	Yes
15	Death certificate	NA	Yes
16	Mobile Number and Email address	Yes	Yes
17	Passport size photographs	3(Jt. with spouse)	3 (applicant)
18	Disability certificate	NA	Yes

On receipt of the above claim documents for pension/family pension, the claim will be scrutinized by Pension Cell and will convey as under:

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### [A] In case of Sanction :

(i) The sanction will be conveyed mentioning the details of Bank's contribution to Provident Fund amount (along with accumulated interest thereon) received by he/she at the time of their resignation or later to be refunded in BGGB Pension Trust Account for joining the Pension scheme from the date of retirement,

(ii) Subsequently, if resigned staff / family member refuses to refund the Bank's Contribution to PF , it will have to be submitted in writing ,

(iii) once refusal for refund is received at Head Office, no request shall be entertained for re-consideration of request.

**[B] In case of rejection :** The rejection will be conveyed to resigned staff / family member under proper acknowledgement.

Note : Only on receipt of confirmation from Pension Cell and fulfillment of other terms and condition will be treated as option for pension in terms of various provisions of the Pension Regulation.

### [C] Release of Pension :

Upon refund of the Bank's PF contribution by the resigned staff/family member and fulfillment of other terms and condition, the pension claim will be finalized and released in the succeeding month in which Bank's PF contribution is refunded after getting approval from the competent authority.

### Note :

(i) Pension shall be computed as per the applicable provisions of the Pension Regulation as applicable to relevant Bi-partite Settlement/Joint Note in which he/she relieved,

(ii) Commutation (if applied) will be extended as per the extant guidelines/amendments of Pension Regulation as per Government of India directives.

For any clarification in SOP / Guideline / Scheme / - branches / Regional Offices should contact Head Office.



To  
The Trustee,  
Baroda Gujarat Gramin Bank  
Employees' Pension Fund  
Trust,  
Vadodara

**UNDERTAKING**

**Sub :** Exercise of option for pension in terms of the direction of Hon'ble Supreme Court of India in Contempt Petition No.1798 of 2018

In accordance with the direction of Hon'ble Supreme Court of India in Contempt Petition No.1798 of 2018 and subsequent direction from NABARD, an announcement for exercising an option has been made by the Bank on \_\_\_\_\_ and I am eligible for exercising an option for pension as I satisfy all the conditions stipulated in the above mentioned directions, which also require that I have to submit an undertaking for exercising the option and hence I am submitting the undertaking as under :

1. I hereby unequivocally and unconditionally agree to withdraw any pending legal proceedings initiated by me either individually or along with others where in my right, to opt for pension, though I had resigned from the services of the Bank, is directly or indirectly one of the issues for consideration by the concerned court or authority, having jurisdiction and powers to adjudicate or decide such issue and take necessary steps to ensure that I cease to be party to such pending proceedings and my right, to opt for pension is no longer Res Integra in such proceedings concerning such right in future.
2. In the event of breach of undertaking on my part the Bank shall be entitled to suspend payment of pension until I submit necessary evidence to establish that I have complied with the undertaking.

Yours faithfully,

Signature

Name in full :  
Employee Id :  
Retirement Designation :  
PPO No.

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

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

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(शिडपूल्ड बैंक)

**ANNEXURE - IV****IDENTIFICATION FORM**

1	Employee's Name	
2	Employee No.	
3	Designation on date of resignation/compulsory retirement/dismissal	
4	Last place of posting	
	[a] Name of Branch/Office	
	[B] SOL ID	
	[C] Name of Region	
5	Gender (Male/Female)	
6	Identification mark	
7	[a] Present address [including City, District, State and Pin Code]	
	[b] Permanent address [including City, District, State and Pin Code]	
	[c] Communication details [mandatory] : [a] Mobile	
	[b] e-mail id	
8	PAN No. (attach self attested copy)	
9	AADHAR No. (attach self attested copy)	
10	Attach Death certificate if spouse is not alive	
11	Remark, if any	

Specimen signature of Left/Right thumb impression of the employee

\_\_\_\_\_

employee in case illiterate employee

\_\_\_\_\_

**JOINT PHOTO OF  
EMPLOYEE &  
SPOUSE**

(Photo to be signed/sealed by branch and if spouse is not alive death certificate to be attached)

Verifying branch

Signature with seal	
Name of branch head	
Designation	
SOL ID	
Employee Id	
Branch/Office Name	
Date	



**FORMAT - 3**  
**BARODA GUJARAT GRAMIN BANK**  
**Head Office: BHARUCH , Dist. BHARUCH**

**Option Form to be filled in by the family of those employees of the Bank who are eligible for family pension (To be submitted in quadruplicate through the Branch / Office from where retired/posted at the time of death)**

Date of receipt of application at Branch / Office	Recent photograph of the applicant to be pasted here and then to be attested by the Branch /Office Head	<b>FOR HO USE ONLY</b>
Forwarded on:		<b>OPTION NOTED IN SERVICE RECORD / EPF RECORD OF THE DECEASED EMPLOYEE</b>
Forwarded by:		
Signature with office seal (Branch/Office)		(Signature of the concerned Authority at HO with date)

The Chairman  
Baroda Gujarat Gramin Bank  
Head Office - Bharuch

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

I hereby declare that I have read and understood the Baroda Gujarat Gramin Bank (Employees') Pension Regulations, 2018 and I hereby voluntarily opt to become a member of the Bank's Pension Scheme and irrevocably authorize the EPFO / RPF to transfer my entire Pension Fund kept with them to Bank to credit Pension Fund to be created for this purpose. I undertake to refund the Bank's contribution to EPF Fund together with accrued interest thereon paid to my husband/wife/father/mother/son/daughter (delete whichever is not applicable) on his/her death while in service/ after retirement from Bank's service. I also undertake to refund the non-refundable withdrawal from EPF balance (Bank's contribution component) availed by my husband/wife/father/mother/son/daughter (delete whichever is not applicable), if any, together with interest at EPF rate from time to time up to the date of retirement / death.

1. Name of the applicant/dependent of deceased employee  
in Full (in Block letters): \_\_\_\_\_
2. Name of the deceased employee in Full (in block letter): \_\_\_\_\_
3. EPF No of the deceased employee: \_\_\_\_\_
4. Relationship with the deceased employee; \_\_\_\_\_
5. Name of guardian if applicant is minor; \_\_\_\_\_



6. Present Residential Address (in block letter): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

7. Date of death of the deceased employee (Documentary evidence to be attached): \_\_\_\_\_

8. Date of retirement from Bank's service: \_\_\_\_\_

9. Branch /Office last served and post held \_\_\_\_\_

10. Branch from where pension to be drawn: \_\_\_\_\_ Branch

11. List of documents / evidences to be attached:

- a) Copy of Superannuation / retirement order of the deceased employee (If applicable)
- b) Copy of Death Certificate of the Employee
- c) Copy of Birth certificate of child eligible for pension
- d) Copy of AADHAAR CARD/ KYC document in the name of applicant
- e) Any document in support of the stated relation of the applicant

(Mention the name / nature of document)

I hereby declare that what are stated in the application and documents submitted are true, correct and genuine.

Enclosures: As stated in point 11 above.

(Signature of the applicant)

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

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

Signature attested by the Branch/Office Head with Office Seal





**FORMAT - 4**  
**BARODA GUJARAT GRAMIN BANK**  
\_\_\_\_\_ **BRANCH / OFFICE**

Ref : \_\_\_\_\_

The Chairman  
Baroda Gujarat Gramin Bank  
Head Office - Bharuch

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

Dear Sir,

**Sub: Ten months (prior to death/retirement) average pay & allowances of Shri/Smt. \_\_\_\_\_ (EPF No \_\_\_\_\_)**

We are furnishing below the 10 months (prior to death/retirement) average pay & allowances of Shri /Smt. \_\_\_\_\_

Designation (Last) \_\_\_\_\_, EPF No \_\_\_\_\_  
who retired / died on \_\_\_\_\_ for calculation of pension under Baroda Gujarat Gramin Bank (Employees') Pension Regulations, 2018.

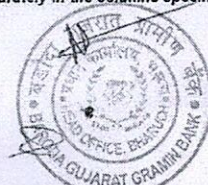
1. Basic Pay		
2. Stagnation increment		
3. Pay and Allowances rank for DA		
a) (Mention nature of allowance)		
b)		
c)		
d)		
4. Period of Extra Ordinary Leave on Loss of Pay sanctioned by the Competent Authority and enjoyed during the Service Period		
5. Leave Without Pay during Service Period		

Yours faithfully,

Signature with Seal

....., Branch

Note: 1. Delete which is not applicable 2. No columns should be left blank 3. Basic Pay & Stagnation Increment to be reported separately in the columns specified 4. For arriving at the ten months' average please refer to Regulation 36 of Baroda Gujarat Gramin Bank (Employees') Pension Regulations, 2018





**FORMAT – 4 (PAGE – 2)**

\_\_\_\_\_ **BRANCH / OFFICE**

**DETAILS OF LAST TEN MONTHS SALARY**

<b>MONTHWISE BREAK UP YEAR &amp; MONTH →</b>										
<b>1. Basic Pay</b>										
<b>2. Stagnation increment</b>										
<b>3. Pay and Allowances rank for DA</b>										
a) (Mention nature of allowance)										
b)										
c)										
d)										
<b>TOTAL</b>										
<b>AVERAGE</b>										

*Note: 1. Delete which is not applicable 2. No columns should be left blank 3. Basic Pay & Stagnation Increment to be reported separately in the columns specified 4. For arriving at the ten months' average please refer to Regulation 36 read with Regulations 2 (c) & 2 (t) of Baroda Gujarat Gramin Bank (Employees') Pension Regulations, 2018*

Date \_\_\_\_\_

Signature with seal







Place:..... Designation:..... Branch:.....

Date:..... Name:.....

(Signature with office seal)

(Signature of the Pensioner/Family Pensioner with date)

day. His / Her AADHAAR No .....

.....(address) holder of PPO No..... and that he /she is alive on this

..... Certified that I have seen the pensioner ..... (name)

*(To be submitted by the Pensioner once in a year in November)*

**LIFE CERTIFICATE**

(\*Please ✓ as applicable)

.....	.....	.....	.....
.....	.....	.....	.....
.....	.....	.....	.....
.....	.....	.....	.....

FORMAT - 6





**FORMAT - 8**

**CERTIFICATE OF NON- REMARRIAGE / NON-MARRIAGE**  
**(APPLICABLE FOR FAMILY PENSIONERS ONLY)**

\* I hereby declare that I have not got re-married and I undertake to report the same promptly in the event of my re-marriage. (Applicable for widow / widower Family Pensioner)

\* I hereby declare that I am not married and I undertake to report the same promptly in the event of my marriage. (Applicable for un-married daughter Family Pensioner)  
**(\* Please delete which is not applicable)**

Signature of the Family Pensioner:

Name of the pensioner: .....

Place : .....Date: .....

I certify to the best of my knowledge and belief the above statement is correct.

(Signature of the Bank's Officer or respectable /well known person)

Place : .....

Date : .....

Name : .....

Designation: .....

Address: .....





**FORMAT – 10**

**Letter of undertaking by the Pensioner and Family Members / Nominees**

**The Branch Manager**  
**Baroda Gujarat Gramin Bank**  
.....**Branch**

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

Dear Sir,

**Sub: Payment of Pension under PPO No. \_\_\_\_\_ through your Branch**

In consideration of making payment of Pension as per the Baroda Gujarat Gramin Bank (Employees') Pension Regulations 2018, I / We do hereby solemnly, sincerely and conscientiously declare and say as under

I / We, hereby undertake and agree to bind myself / ourselves and my / our heirs, successors, executors, and administrators to indemnify the Bank from and against any loss suffered or incurred by the Bank in making payment as aforesaid and to forthwith pay the same to the Bank and / or adjust from the pension fund under the aforesaid Regulations and / or from any account maintained with the Bank without any notice to me/ us.

Yours faithfully,

Signature (Pensioner) ; \_\_\_\_\_

Signature of Family Members / Nominees: \_\_\_\_\_

Witness

Signature		
Name		
E.P.F No		
Address		





**FORMAT - 11**

**FORM OF NOMINATION**

To  
THE TRUSTEES, BARODA GUJARAT GRAMIN BANK (EMPLOYEES') PENSION FUND

I, \_\_\_\_\_ PPO No/ EPF No \_\_\_\_\_ hereby nominate the person(s) named below and confer on him / them the right to receive , to the extent specified below , the amount of pensionary benefits under the Pension Regulations in the event of my death before the amount become payable, or having become payable, has not been paid.

Name and address of the Nominee(s)	Relationship with the pensioner	Age	Amount of share (%)	Date of Birth	IF NOMINEE IS MINOR
					Name & address of the person who may receive the said pension during the nominee's minority
( 1 )	( 2 )	( 3 )	( 4 )	( 5 )	( 6 )

Name and address of other Nominee(s) in case the nominee under column 1 above predeceases the pensioner	Age	Relationship with the pensioner	Amount of share (%)	Date of Birth ,if the other nominee(s) is/are minor	Name & address of the person who may receive the pension during other nominee's minority	Contingency on happening of which nomination shall become invalid
( 7 )	( 8 )	( 9 )	( 10 )	( 11 )	( 12 )	( 13 )

This nomination supersedes the nomination made on \_\_\_\_\_ which stand cancelled.

Place: \_\_\_\_\_ Signature / Thumb Impression (if illiterate) of Pensioner/Employee

Date: \_\_\_\_\_  
Name of Pensioner/Employee : \_\_\_\_\_

WITNESS : 1. \_\_\_\_\_ 2. \_\_\_\_\_  
Address : \_\_\_\_\_ Address : \_\_\_\_\_

Signature \_\_\_\_\_ Signature \_\_\_\_\_  
EPF No \_\_\_\_\_ EPF No \_\_\_\_\_

ATTESTED by the Pension Disbursing Branch/ Deptt. at H O / Branch

SEAL OF ATTESTING AUTHORITY

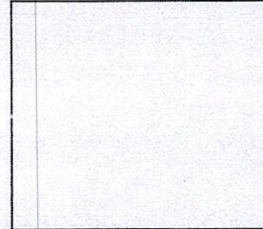
NOTE:1. If the employee has a family, the nomination shall not be in favour of any person or persons other than the members of the family. 2. If the employee has no family, the nomination may be made in favour of person or persons, or a body of individuals whether incorporated or not.. 3. Strike out which is not applicable.





**FORMAT – 12**  
**BARODA GUJARAT GRAMIN BANK**  
**Head Office: BHARUCH , Dist. BHARUCH**

**Application for grant of Family Pension in the event of death of Employee / Pensioner**



The Chairman  
Baroda Gujarat Gramin Bank Bank  
Head Office - Bharuch

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

Dear Sir,

I hereby declare that as an eligible family member to receive Family Pension in terms of Baroda Gujarat Gramin Bank (Employees') Pension Regulations, 2018, I am submitting below the requisite particulars for kind favour of sanction of Family Pension to me.

1. Name of the applicant (in block letters) : \_\_\_\_\_

i) . Relation with the deceased employee/pensioner: \_\_\_\_\_

ii) . Date of Birth : \_\_\_\_\_

iii) . Name of the Guardian if the deceased  
Person is survived by minor child/children \_\_\_\_\_

iv) . Religion and Caste : \_\_\_\_\_

02. Present residential address of the : \_\_\_\_\_  
Applicant (in block letters) \_\_\_\_\_

\_\_\_\_\_ Contact No \_\_\_\_\_

03. Name & age of surviving parent/widow/widower/children of the deceased employee / pensioner:

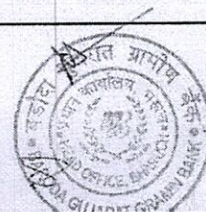
Sr No	Name	Relationship with the deceased employee/pensioner	Date of Birth ( by Christian era)

04. Name of the deceased employee/pensioner \_\_\_\_\_

05. EPF No of the deceased employee: \_\_\_\_\_

06. Date of death of the employee /pensioner: \_\_\_\_\_

(Documentary evidence to be attached)



07. Date of retirement (in case of Pensioner): \_\_\_\_\_

08. a) Branch/Office in which the deceased employee/  
Pensioner served last and post held by him/her \_\_\_\_\_

b) PPO No of the deceased, if any, with the nature  
of pension & Disbursing Authority. : \_\_\_\_\_

09. If the applicant is guardian, date of birth of minor  
& relationship with the deceased employee/pensioner \_\_\_\_\_

10. a) Is the applicant (other than guardian) a pensioner ? **YES / NO**  
if so, indicate the amount of monthly pension : \_\_\_\_\_

b) Is the applicant employed? If so, particulars **YES / NO**  
in details with last pay drawn certificate from employer :

11. Description of the applicant including (a) Height \_\_\_\_\_ cm

(b) Personal Identification marks, if any, on hand, face etc. \_\_\_\_\_

12. Signature/LTI \*\* of the applicant (Duly  
Attested by the Branch head with seal)

\_\_\_\_\_  
**SIGNATURE / LTI OF THE APPLICANT  
IS ATTESTED**

**(Signature of the Branch Head with Seal)**

13. a) Name of the Branch of the Bank through which  
Family Pension is to be drawn : \_\_\_\_\_

b) SB Account No : \_\_\_\_\_

14. List of Documents / evidence attached:

- a) Three copies of passport size recent photograph of the applicant, duly attested in front side
- b) Attested copy of the Death Certificate of the deceased Employee/ Pensioner
- c) Birth Certificate of the children eligible for pension.
- d) Any other document(s) indicating that the applicant is a genuine claimant e.g. AADHAAR Card, Voter Card etc.

15. I hereby declare that what are stated in this application and documents submitted herewith are true,  
correct and genuine.

Yours faithfully,

\_\_\_\_\_  
Signature/LTI of the applicant

**\*\* To be furnished in case the applicant is not literate enough to sign his/her name or unable to sign due to poor health condition which also needs submission of Medical Certificate.**





**FORMAT - 13**  
**BARODA GUJARAT GRAMIN BANK**  
 Head Office: BHARUCH, Dist. BHARUCH

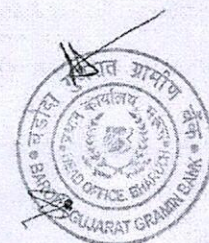
**Clearance / Pre-disbursement formalities to be furnished by  
 the proposed Pension Paying Branch**

01. Date of Report		
02. Name of the Pension Paying Branch		
03. Branch Code No / SOL ID		
04. Pensioner's name		
05. Pension Type (General or /Family Pension)		
06. PPO No / EPF No (in case of Family Pension , mention EPF No of original pensioner		
07. S B Account No		
08. Date of Certificates		
a) Life Certificate		
b) Non-Marriage/Re-Marriage Certificate (For Family Pensioner only)		
c) Non-Employment/Re-Employment Certificate		
d) Disability Certificate		
09. Whether Undertaking for refund of Excess Payment is taken		YES / NO

**Branch Manager**  
 (Please use Branch Seal)

.....**Branch**  
**Baroda Gujarat Gramin Bank**

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



On Stamp of Rs.300/-

**AFFIDAVIT-CUM-DECLARATION**

I, \_\_\_\_\_ wife/spouse of late \_\_\_\_\_ aged \_\_\_\_\_ years, presently residing at \_\_\_\_\_ (Place), and with Permanent Address at \_\_\_\_\_ (street/area), \_\_\_\_\_ (village/city), \_\_\_\_\_ (district), Gujarat (state), do hereby solemnly affirm and declare, as under :-

1. My husband/spouse late \_\_\_\_\_ has retired from/died while in service in erstwhile \_\_\_\_\_ Gramin Bank, \_\_\_\_\_ (Branch/Office) \_\_\_\_\_ (Region), as \_\_\_\_\_ (Post/Cadre), on \_\_\_\_\_ (Date of death/Retirement). His/her PF Account Number on the date of death/retirement is GJ/\_\_\_\_\_.

2. I hereby declare that I have read the bank's Pension Regulation, 2018/ Amendments and have opted voluntarily to become a member of the Bank's Pension Scheme. I further undertake and agree to abide by the Baroda Gujarat Gramin Bank (Employees') Pension Scheme, 2018, adopted by the Bank for the purpose.

3. That my husband/spouse Provident Fund Account No. GJ/\_\_\_\_\_ is maintained with the Regional Provident Fund Commissioner, Employees Provident Fund Organization, Regional Office, Vadodara/Ahmedabad/\_\_\_\_\_.

4. I further declare that my husband/spouse have withdrawn sum of Rs. \_\_\_\_\_ on \_\_\_\_\_ (Date/Year) from Provident Fund amount (Bank's contribution), from the Employees' Provident Fund Organization.

5. I irrevocably authorize the RPFC, EPFO to transfer the entire contribution of the Bank along with interest thereon to the credit of the BGGB Pension Fund and adjust Bank's contribution component including my non-refundable withdrawal from EPF balance (Bank's contribution component), with interest thereon, in the BGGB Pension Fund. I further irrevocably authorize the Bank to deduct from the Family Pension Amount payable by the Bank to me, the Employees' Pension amount ₹\_\_\_\_\_ every month being paid and/or to be paid by the RPFC, EPFO under EPS.

6. As I have applied for the family Pension, I irrevocably authorize the Bank/the Baroda Gujarat Gramin Bank (Employees') Pension Fund Trust to hold the amount payable to me till refund of entire FPF/EPF, and as also, the refund of the partial/full withdrawal of FPF, if availed by my husband/spouse, to the credit of the Bank/BGGB (Employees') Pension Fund Trust.

7. I, further undertake to refund excess amount or any amount of Pension/commutation part amount paid inadvertently/not entitled to rightfully, either by credit to my savings account or otherwise. I irrevocably authorize the Bank to forthwith recover the same by debit to my Savings Bank Account No. \_\_\_\_\_ maintained with Baroda Gujarat Gramin Bank, \_\_\_\_\_ Branch, or if need be, by recourse to legal action in the appropriate court of law.

**ATTESTATION**

I, \_\_\_\_\_ spouse/daughter/of \_\_\_\_\_ do and hereby attest and re-affirm that the statement made herein above by me, is true and correct to the best of my knowledge and belief. I know that furnishing wrong declaration is a punishable offence under Bhartiya Nyaya Sanhita.

I hereby sign and execute this Affidavit-cum-Declaration, as a mark of my attestation.

(DECLARANT)

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

Date: \_\_\_\_\_, 2024

.....  
OATH COMMISSIONER/NOTARY PUBLIC  
(Seal & Signature with Date)