



JOINT OPTION FOR AVAILING OPTION UNDER EMPLOYEES' PENSION SCHEME-1995
(For spouse of deceased employees)

To

The Regional Provident Fund Commissioner
Employees Provident Fund Organization

Sub : Submission of Joint Option Form by Spouse of deceased employee

Particulars of the spouse of deceased employee are as under:		
1.	Name	
2.	Address	
3.	Mobile No.	
4.	E-mail ID	
5.	PAN No.	
6.	Aadhar No.	
Particulars of the deceased employee are as under :		
1.	Name & Designation of deceased employee	
2.	Grade	
3.	EPF A/c No.	
4.	UAN Number	
5.	Payment Pension Order No. (PPO), if applicable	
6.	PAN No.	
7.	Aadhar No.	
8.	Date of Birth	
9.	Date of Death	
10.	Date of attaining age of 58 years, if applicable	

DECLARATION BY THE SPOUSE OF DECEASED EMPLOYEE

- It is certified that immediately after joining Steel Authority of India Ltd., my spouse had been contributing towards the Provident Fund on his/ her actual salary/wages and an equal amount was being contributed in the PF by the employer also, as provided under Para 26(6) of EPF Scheme, 1952. It is to further certify that an amount @ 8.33% of the statutory ceiling limit i.e. Rs.15,000/- (earlier Rs. 6,500/- / 5,000/-) out of the Employer's contribution had been remitted by my spouse's employer every month towards Employees' Pension Scheme, 1995.
- Since I have already withdrawn the entire amount of Provident Fund on separation of my spouse, I undertake to return the due differential amount that had been withdrawn after my spouse's retirement/exit i.e., the difference between the amount @ 8.33% of **my spouse's actual salary/wages out of employer's contribution** towards Pension Fund and the amount already remitted by the employer in EPS'95 on ceiling salary/wages from the date of joining the EPS'95 till deduction with due interest for claiming my eligibility for drawing Pension on the basis of actual salary/wages, instead of on ceiling salary/wages, in accordance with the aforesaid judgements.

In case, EPFO directs to submit any other format of joint option form subsequently, I agree to submit the same once again.

Place : _____
Date : _____

Signature : _____
Name : _____

DISCLAIMER

It is to clarify that mere submission of Joint Option Form does not imply that the spouse of employee shall be entitled to enhanced pension on actual salary/wages out of employer's contribution towards

EPS-95. The same will be subject to compliance(s) of EPFO and/ or any judicial pronouncements/ statutory announcements.

The Company assumes no responsibility or liability in case EPFO does not enhance pension, as mentioned above, for any reason whatsoever and decision of EPFO shall be final in this matter.

NOTE : Please take print-out of this form (including 'Undertaking by the Employer') and send original signed copy in triplicate with following list of self-attested documents to concerned Nodal officer of your Plant/ Unit :

1. Recent passport size photograph of spouse
2. Copy of Aadhar of deceased employee and spouse
3. Copy of PAN of deceased employee and spouse
4. PPO No.
5. Copy of Death certificate of deceased employee

UNDERTAKING BY THE EMPLOYER

I, _____ (Name and Designation) being the authorized signatory on behalf of Steel Authority of India Ltd., do hereby certify that late Shri/ Smt. _____ was working with us as _____ and will/ had attained age of 58 years on _____ (notional). His/ her EPF A/c No. is _____. He/ she was contributing towards Provident Fund on his/ her actual salary/wages, as per the terms of Para 26(6) of the EPF Scheme 1952. Equal share was being contributed by this establishment too. This establishment has no objection if his/ her spouse deposits/returns the due differential amount w.e.f. 16.11.1995 i.e. from the date of commencement of the Scheme or when employee's salary/wages exceeded the statutory limit, along with due interest as declared under EPF Scheme, 1952 from time to time, thus making him/ her eligible for drawing pension on the basis of Pensionable salary based on the actual salary/wages, instead of on the statutory limit as per erstwhile Para 11(3) and Para 11(4) of the EPS'95 Scheme as permitted to do so by the aforesaid judgement of Supreme Court dated 04.10.2016 implemented by EPFO vide circular dated 23.03.2017 after due approval from CBT (19.12.2016) & MoL&E (16.03.2017) and as per judgement of Hon'ble Supreme Court dated 04.11.2022.

I certify that the particulars furnished above are correct as per the available record.

Place: _____

Date : _____

(Signature of authorized signatory with official seal)