

<b>Annexure 2</b>	2
Form 'B'	

Application	Number

# **APPLICATION FORM For Floating Rate Savings Bonds**, 2020 (Taxable)

### Information regarding Floating Rate Savings Bonds, 2020 (Taxable)-

- (i) The interest on the bonds is payable semi-annually with resetting of coupon rate every 01 January and 01 July.
- (ii) The bonds will be issued subject to the terms and conditions laid down in <u>Government of India Notification No.F.No.4(10)- B(W&M)/</u> 2020 dated June 26, 2020.

#### Instructions regarding filling up of the form-

- (i) Please fill the application form in all respects. Incomplete form is liable to be rejected.
- (ii) In fields with \*mark, strike out whichever is not applicable.
- (iii) It is strongly recommended that the Nomination Form may also be filled in along with the Application Form, in order to avoid inconvenience later.

# Applicant(s) Details [in block letters]

1 <sup>st</sup> Applicant / Sole Applicant De	tails	<b>;</b>																
Name in full																		
Gender *	M	ALE	/ FE	MAL	E.							 · ·						
Date of Birth: (DDMMYYYY)																		
PAN Number																		
Mother's maiden name																		
Communication Address																		$\dashv$
																		$\uparrow$
Telephones (Mobile/Residence)																		$\top$
Email Address																		
																•		
2 <sup>nd</sup> Applicant Details																		
Name in full																		
Gender *	M	ALE	/ FE	MAL	.E													
Date of Birth: (DDMMYYYY)																		
PAN Number																		
3 <sup>rd</sup> Applicant Details																		
Name in full																		
Gender *	M	ALE	/ FE	MAL	E.											•	•	
Date of Birth: (DDMMYYYY)																		
PAN Number																		



Name in full  Gender *																					
Gender *																					
	MAI	L _E / FE	I I EMALE	L E						<u>                                       </u>					11					1	1
Relationship with Minor *	der * MALE / FEMALE  Itionship with Minor * FATHER / MOTHER / LEGAL GUARDIAN  of Birth: (DDMMYYYYY)  In Mother / LEGAL GUARDIAN  imunication Address  phones (Mobile/Residence)  Itil Address  RESIDENT INDIVIDUAL / HUF / ON BEHALF OF MINOR / POWER OF ATTORNEY HOLDER  CREDIT TO EXISTING BLA No. / OPEN A NEW BLA @  @- applicable only for first time investor  of Information * SINGLE / JOINT / ANYONE OR SURVIVOR / LEGAL GUARDIAN  of Information * CASH (up to Rs. 20,000/- only) / CHEQUE / DEMAND DRAFT / ELECTRONIC CREDIT  Number / Dated / Drawn on Bank/branch / Drawn on Bank																				
Date of Birth: (DDMMYYYY)																					
Communication Address																					-
me in full  Inder * MALE / File  Ilationship with Minor * FATHER /  Ite of Birth: (DDMMYYYY)  Immunication Address  Ilephones (Mobile/Residence) Inail Address  Inder Details  Plicant Status * RESIDEN  Inder of Holding * SINGLE /  Inder of Investment * CASH (up  Inder of Investment * Investment * Investment Operation  In figures  In figures  In figures  In figures  In words)  In figures  In words  In words																			<del> </del>		
Telephones (Mobile/Residence)																					-
Email Address																					-
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Other Details	,																				
Applicant Status *	RES	SIDEN	T IND	IVIDU	AL / H	UF / C	N BE	HALF	OF M	INOR	/ POW	ER O	F AT	ORN	EY H	IOLE	DER				
Investment Details *	CRE	EDIT T	O EXI	ISTING	3 BLA	No					/ C	PEN.	A NE\	V BLA	A @						
investment Details	@- :	applica	able or	nly for	first tir	me inv	estor														
Mode of Holding *	SIN	GLE /	JOINT	/ AN	ONE	OR S	URVI	/OR/	LEGA	L GUA	ARDIA	N									
Mode of Investment *	CAS	SH (up	to Rs	.20,00	0/- on	ly) / C	HEQU	E / DE	EMAN	D DRA	AFT / E	LECT	RON	IC CR	REDIT	-					
	Nun	nber_						_													
FOR CHEQUE / DD																					
	Dra	wn on	Bank/	branch	າ								_								
Investment Amount	(In f	igures	) Rs																		
	(In v	words)	Rupe	es																	
	ı																				
BANK PARTICULARS of the 1 <sup>st</sup>	Appli	cant F	OR P	AYME	NT OI	FINTE	RES	/ RE	DEMP	TION	AMOL	JNT									
Account Holder Name																					
Bank Name																					
Branch Name / Address		1	1	1	ı		ı		ı	1	ı		1		1			1			
Branch																					
Account No.																					
IFSC Code																					
Account Type*	SB	/ Curre	ent	•		•		•			•	•		•	•			•	1		

Nominee details- Nomination Form (as applicable) may be filled and submitted along with the application form.



(Signature of the Karta with seal of HUF)

**Declaration:** I/We hereby declare and undertake that (i) the information furnished in this application form is correct and complete. If the transaction is delayed at all for reasons of incomplete or incorrect information, I would not hold the user institution responsible. (ii) I have read and understood the details of information for the investors as well as rights and duties of investors (copy attached). The agent/bank has explained the features of the scheme. (iii) I hereby agree to discharge the responsibility expected of me as a participant under the scheme.

-	come Tax exemption, if any – (Please s ax exemption from Income Tax Authoritie	-	
bmitting a true copy of	the certificate along with the application fo	rm.	
	Signature / Thumb Impression		
1st Applicant			
2nd Applicant			
3rd Applicant			
Date -			Date, Bank Stamp & Signature of the authorized official of the Receiving Office
Place			
	In case of thumb impression	, attestation by t	wo witnesses
	1 <sup>st</sup> Witness		2 <sup>nd</sup> Witness
Name		Name	
Address		Address	
Signature		Signature	
U.F. declaration (mand	datory, if applicant is Karta of HUF)	1	
·		ao addross givor	n against First Applicant, do solemnly affirm that I an
	ndivided Family and as such have full p		n the Floating Rate Savings Bonds 2020 (Taxable),
ecimen signature for a	nd on behalf of the HUF (name of the HUF	<del>-</del> )	

# For Office use only

Broker's name & Code	Sub Broker's name & Code	Bank branch stamp	Branch name & Code	BLA Number	Verified By
108529-Tipsons					
Date of receipt of Application (DD/MM/YYYY)	Date of realization of funds (DD/MM/YYYY)	Date of transfer to Link Cell (DD/MM/YYYY)	Full Address of the Bra	anch	Any other information



## **INFORMATION FOR INVESTORS IN Floating Rate Savings Bonds, 2020 (Taxable)**

Government of India had introduced **Floating Rate Savings Bonds**, **2020 (Taxable)** vide their <u>notification No. F.No.4(10)-B(W&M)/2020 dated June 26, 2020</u>. The main features of the Scheme are as under:

Item	Floating Rate Savings Bonds, 2020 (Taxable)	Remarks
Category of     Investor	Resident Individual, HUF.	Non-Resident Indians (NRI)s are not eligible to invest in these bonds.
2) Limit of investment	Minimum `1000/- and in multiples of ` 1000/	No maximum limit.
	Date of receipt of subscription in cash (up to	140 maximum iimit.
3) Date of Issue of		
bonds	` 20,000/- only), or date of realization of	
	cheque /draft/ funds.	
4) Forms of Bonds	Electronic form held in the Bond Ledger	Bond Ledger Account will be opened
	Account.	by the Receiving Office in the name
		of investor/s.
5) Interest	(i) Interest is payable semi-annually from the	Half-yearly interest is payable on 1st
,	date of issue of bonds, up to 30th June / 31st	January / 1 <sup>st</sup> July. The coupon on 1st
	December as the case may be, and thereafter	January 2021 shall be paid at 7.15%.
	half-yearly for period ending 30th June and	buridary 2021 orian be paid at 7:1070.
	31st December on 1st July and 1st January	
	respectively.	
	(ii) The coupon rate payable for next half-year	
	would be reset on 1st January 2021 and	
	thereafter, every 1st July and 1st January.	
6) Post Maturity	Post Maturity Interest is not payable.	
Interest		
7) Bank account	It is mandatory for the investor/s to provide	
,	bank account details to facilitate payment of	
	interest /maturity value directly to his/her/their	
0) T	bank account.	Taxaa 20 baada daata data aa aa aa aa baba
8) Tax benefits	Income from the bonds is taxable.	Tax will be deducted at source while
		interest is paid.
		If an exemption under the relevant
		provisions of the Income Tax Act,
		1961 is obtained, it may be declared
		in the Application Form.
9) Nomination	The sole Holder or all the joint holders may	
Facility	nominate one or more persons as nominee in	
	accordance with the provisions of the	
	Government Securities Act, 2006 (38 of 2006)	
	and the Government Securities Regulation,	
	2007, published in Part III, Section 4 of the	
	Gazette of India dated December 1, 2007.	
10) Maturity mariad		
10) Maturity period	7 years from the date of issuance.	Barrelli albania C. 500/ af 1 f
11) Premature	Facility is available to the eligible investors	Penalty charges @ 50% of last
redemption	after Lock in period of 4, 5, and 6 years in the	coupon payment.
	age bracket of 80 years and above, between	
	70 to 80 years and 60 to 70 years	
	respectively.	
12) Transferability	The bonds are not transferable.	Transferability is limited to
		nominee(s)/legal heir in case of death
		of holder.
13) Tradability /	The bonds are not tradable in the secondary	
Advances	market and also not eligible as collateral for	
	availing loans.	
14) Application forms	Available at designated branches of SBI,	
14) Application forms		
	11 Nationalised Banks and 4 Private Sector	
	Banks.	



#### **DUTIES OF INVESTOR/ APPLICANTS**

- A) Please complete the application in all respects.
- B) Incomplete applications are liable to result in delay of issue of the bonds (at the cost of the applicant).
- C) In case the application is submitted by a Power of Attorney (POA) holder, please submit original POA for verification, along with an attested copy for record.
- D) In case the application is on behalf of a minor, please submit the original birth certificate from the School or Municipal Authorities for verification, together with an attested copy for record.
- E) Please note that nomination facility is available to a Sole Holderor all the joint holders (investors) of the bonds.
- F) In case nominee is a minor, please indicate the date of birth of the minor and a guardian can be appointed.
- G) Nomination facility is not available in case the investment is in the name of a minor.
- H) Please notify the change of address to Receiving Office immediately.
- I) POST MATURITY INTEREST IS NOT PAYABLE ON THESE BONDS. The interest and redemption proceeds will be credited on the due date as per bank details registered with us.
- J) Indicate your date of birth / age.
- K) Provide your correct bank account details for receiving payment through electronic mode. In case of closure/transfer of the bank account, the fresh details may be immediately intimated to the Receiving Office to avoid any inconvenience.
- L) Any information regarding tax applicability may be provided to the bank/branch.

#### **RIGHTS OF THE INVESTOR**

- The Certificate of Holding will be issued in electronic form within 7 working days from the date of tender of application.
- b) The interest on the bond accrues from the date of receipt of funds/realization of cheque/draft and will be credited to the bank account of the holder directly, as per the details provided by him/her in the application form
- c) The interest will be paid semi-annually and credited to the investors account every 01 January and 01 July with last installment on date of redemption.
- d) Maturity intimation advice will be issued one month before the due date of the bond.
- e) Application forms for investments, redemption, nomination etc., in respect of Savings Bonds shall be available on the websites of Receiving Offices.
- f) A sole holder or all the joint holders may nominate one or more nominees to the rights of the bonds. Non-resident Indians can also be nominated.
- g) The investor(s) can make separate nomination for each investment held under the BLA.
- h) The nomination will be registered at the Office of Issue and an acknowledgement of Registration will be issued to the holder.
- i) The nomination can be varied by registering a fresh nomination.
- j) The existing nomination can be cancelled by a request to the Office of Issue.
- k) The redemption is due on expiry of seven years from the date of investment, unless applied for premature redemption as applicable.
- Premature redemption facility is allowed with certain conditions.
- m) Investors are entitled for compensation for delayed payments at the applicable coupon rate.

In case the issuing bank does not comply with the above, you may lodge a complaint in writing in the form provided at the counter of the bank and address the same to the nearest office of Reserve Bank of India, as under:

THE REGIONAL DIRECTOR, RESERVE BANK OF INDIA, CONSUMER EDUCATION AND PROTECTION DEPARTMENT/ BANKING OMBUDSMAN (LOCATION)

You may also address your complaint to:

THE CHIEF GENERAL MANAGER
INTERNAL DEBT MANAGEMENT DEPARTMENT
RESERVE BANK OF INDIA, 23<sup>rd</sup> Floor
CENTRAL OFFICE, Shahid Bhagat Singh Marg,
MUMBAI-400 001
MAHARASHTRA
E- mail ID – cgmidmd@rbi.org.in

Disclaimer: I have read and understood the details of information for the investors as well as rights and duties of investors. The agent/bank has explained the features of the scheme to me.

Signature/s of the applicant/s		
First Holder Signature	Second Holder Signature	Third Holder Signature
		108529-Tipsons



# Acknowledgement of Application Form

	Application No.
Bank branch	/
Received from Mr./Mrs./Ms	Cash/Draft/Pay
Order/Cheque No./electronic credit.	dated/drawn
on (Bank & branch)	
for` (Rupees	only) for the purchase of Floating Rate
Savings Bonds, 2020 (Taxable) for a period of 7 years, of the	e nominal value of `
(Rupees	only). The bonds are required to be issued
in the form of Bond Ledger Account.	
	Date, Bank Stamp & Signature of the authorized official of the Receiving Office
Note: (i) This receipt is valid subject to realisation of the payment	instrument.
(ii) The "Certificate of Holding" will be issued in electronic fo	orm by (date)



# Floating Rate Savings Bonds, 2020 (Taxable) FORM OF NOMINATION

Annexure 4 Form -' C'

Instructions – The Nomination and its Cancellation shall be governed by the provisions of the Government Securities Act, 2006 (38 of 2006) and the Government Securities Regulation, 2007, published in Part III, Section 4 of the Gazette of India dated December 1, 2007.

minate the following person/s who shall on my/our death have the right to all the investments under the BLA / investments the table below, to receive payment of the interest/amount for the time being due on the said BLA / investments.  PARTICULARS OF INVESTMENT  Amount Date of Full name with Date of Relationship STATUS Particular (Rs.) Repayment expanded initials and birth to holder Resident / Bank A	/ investments spec	for the investment in Floating Rate Savings Bonds, 2020 (Taxable) heret the following person/s who shall on my/our death have the right to all the investments under the BLA / investments specific below, to receive payment of the interest/amount for the time being due on the said BLA / investments.    ULARS OF INVESTMENT	e holder/s of BLA Nofor the investment in Floating Rate Savings Bonds, 2020 (Taxable) here minate the following person/s who shall on my/our death have the right to all the investments under the BLA / investments specification.	(NAME AND ADDRESS)				We							_			-	$\overline{}$	_		_		_	_	_					_													
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