

PROCEDURE TO CLAIM FINANCIAL ASSISTANCE FROM COMPANY SECRETARIES BENEVOLENT FUND (CSBF)

A) IN THE CASE OF DEATH OF THE LIFE MEMBER

Claim for financial assistance from CSBF can be made by submitting the following: -

1. Duly signed application from the dependent claiming financial assistance from CSBF in writing indicating the name, membership number, LM Number and cause of death of the deceased member. Please also indicate communication address, email address, phone number etc.
2. Self attested copy of Identity Proof of the dependent claiming financial assistance.
3. Self attested copy of document in support of having relation with the deceased member (such as Aadhar card, Voter id card, Passport, Marriage Certificate in case of spouse/Birth Certificate in case of children etc.)
4. Copy of Death Certificate of the deceased member.
5. No Objection Certificate from other dependents of the deceased member.
6. Self declaration about annual income in the preceding financial year along with a self attested copy of Income Tax Return filed for the last financial year by the dependent claiming financial assistance, in case the age of the deceased member was above 60 years at the time of death.
7. Copy of cancelled cheque/bank passbook of the dependent claiming financial assistance

B) FOR REIMBURSEMENT OF MEDICAL EXPENSES FOR SELF OR DEPENDENTS

Claim for financial assistance by the Life Member of CSBF for reimbursement of medical expenses incurred for self or dependents can be made by submitting the following: -

1. Duly signed application claiming financial assistance from CSBF indicating the details of medical expenditure, communication address, email address, phone number etc.
2. Original Bills and Payment Receipts for the expenses incurred.
3. An undertaking that the member has neither applied for nor received reimbursement from any other source for the expenses incurred.
4. An undertaking that the member has not claimed any financial assistance for medical reimbursement from CSBF in past. If claimed, details to be provided.
5. Self declaration about his/her annual income in the preceding financial year along with a self attested copy of Income Tax Return filed for the last financial year.
6. Copy of cancelled cheque/bank passbook of the dependent claiming financial assistance

Address to submit request for financial assistance from CSBF

Joint Secretary- Membership
The Institute of Company Secretaries of India
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