

Dear Colleagues,

As your last working day with us approaches, we wanted to take a moment to inform you of the necessary steps to apply for your Provident Fund (PF) withdrawal or transfer.

We would like to clarify that the primary responsibility for managing and maintaining PF accounts rests with the individual employees. The firm only provides limited support to the extent it is required to as an employer in good faith. While we understand that transitioning away from a company can involve various administrative tasks, including PF formalities, Thus For PF withdrawal, or any other PF assistance the firm has introduced Third-party Consultants If required, you may please contact on **Mobile: 8691951515(Nitinium service Pvt Ltd.), email: happy2help@nitinium.com. ("Third-party consultants)**. We want to emphasize that it is the individual's responsibility to ensure their PF account is in order. This includes any necessary submission of forms, transfers, withdrawals, or updates to personal information which if not attended to by the employee in a timely manner could lead to delays due to additional queries.

Please note the following guidelines:

1. The process for PF withdrawal/transfer can be initiated two months after the last contribution made by the employer (i.e., three months after your exit date).
2. For online withdrawal/transfer, the OTP will be sent to the mobile number registered for your Aadhaar. Please ensure you do not change this mobile number.
3. Once the DOE (Date of Exit) is updated, you can apply through EPFO portal for online PF transfer / PF withdrawal.
4. To expedite the process for the resolution of your PF-related concerns the firm encourages you to contact the Third-party Consultants and share the necessary details including personal information (if any), at your sole discretion.

### **ONLINE PF TRANSFER**

In case of a PF transfer, it is crucial to provide accurate details of your EPS (Employees' Pension Scheme) applicability based on your current Employees' Provident Fund (EPF) passbook. Any incorrect information from your side will cause significant difficulties in transferring your PF from Deloitte to your next organization. Please note the below steps that you need to follow for you PF transfer.

- **IF EPF is managed by Company PF trust**
  - For the PF part: Please submit the manual PF transfer form (i.e., form 13) to your new employer.
  - For EPS part (if applicable): Apply online transfer using Form 13 following the below steps as is currently prescribed by the PF portal: □ Login to the UAN portal □ Select Online services.
  - Select "One Member One Account";
  - Select the Approver as per your choice (Either your previous employer i.e., Deloitte or new employer)
  - Enter Your UAN number.

- Click on "Get details"
- Select the details and click on "Get OTP".
- You will receive an OTP on your Aadhaar registered mobile.
- Enter the OTP and click on the "Submit" button.
- A PDF file will be generated for your online transfer claim (it is recommended that you take a printout of the same and keep it in your records to help you respond to respond to any future query(ies) that may be raised by the PF office).

#### **IF EPF is maintained with Regional EPF office.**

- Login to the UAN portal
- Select Online services.
- Select "One Member One Account";
- Select the Approver as per your choice (Either your previous employer i.e., Deloitte or new employer)
- Enter Your UAN number.
- Click on "Get details"
- Select the details and click on "Get OTP".
- You will receive an OTP on your Aadhaar registered mobile.
- Enter the OTP and click on the "Submit" button.
- A PDF file will be generated for your online transfer claim (it is recommended that you take a printout of the same and keep it in your records to help you respond to respond to any future query(ies) that may be raised by the PF office).

#### **ONLINE PF WITHDRAWAL**

- Login to the UAN portal ○ Click on "Online Services" ○ Enter your registered bank Account details and click on "Proceed".
- Select "Claim PF using Form 19 and 10C (i.e., only if you are an EPS Contributor as per your PF passbook)" from the available drop down.
- Submit Form 15G (only in case your service period with the firm is less than 5 years and PF withdrawal amount is less than INR 2,50,000/-) otherwise you may ignore this form.
- Enter your residential address with pin code.
- Upload a copy of a cancelled cheque of your registered bank account with your name (as per your Aadhaar) printed on it - Please note that the attachment should be in JPEG or JPG format with a size between 100 KB to 500 KB.
- Select the consent check box and click on "GET AADHAR OTP".
- You will receive an OTP on your Aadhaar registered mobile.
- Enter the OTP and click on the "Submit" button.

Please note that:

- The above transfer/withdrawal process is a guideline to help you and is subject to any changes that the PF authorities or the PF portal or the law may prescribe from time to time. You may also refer to the key links provided hereinbelow for your help.
- The transfer/withdrawal process must be initiated by you (i.e., the employee) on the EPF portal using your UAN login details.
- As it is understood that the primary responsibility for managing and maintaining PF accounts rests with the individual practitioners. The Firm has limited role and is a mere facilitator of the services provided by the Third-party Consultants, accordingly, you understand that the firm is and shall not be responsible or liable in any manner for Third-party Consultants.

**Updating Date of Exit (DOE):** Employees can update their DOE on the EPF portal through UAN login. The DOE can be updated only after two months of the last contribution made by the employer (i.e., three months after your exit date).

**Steps to update DOE:**

- Login to the Member UAN Portal.
- Navigate to "Manage" -> "Exit Date".
- Select Employment.
- Enter and re-enter the Date of Exit.
- Select the reason for Exit (choose "Cessation short service" till 58 years of age).
- Click on "Request OTP".
- Enter the OTP that you will receive on your Aadhaar registered mobile number.
- Select the consent check box and submit.
- Ensure your DOE in the previous organization and DOJ in your current organization do not overlap.

**Key Links for your easy use:**

- UAN Activation/Login: [UAN Activation/Login](#) • PF Passbook: [PF Passbook](#)
- KYC Updation:
  - Login to your UAN: [UAN Login](#)
  - Click on "Manage."
  - Click on "KYC"

**Important Notes:**

- Once the KYCs are updated by the employee in the PF portal, they will be approved by the employer.
- Valid KYC, Aadhaar, PAN, and bank account details need to be updated and verified in UAN and are mandatory for transfer/withdrawal.
- No physical documents are required for online PF withdrawal.
- UAN details are available on your salary slip.

We hope this information will assist you in the process of your PF transfer or withdrawal.

Please note that it is crucial for you to ensure that all required information and documents for the process (e.g., bank details, Aadhaar, ID proofs, other details, etc.) are accurately completed and submitted by you. Also, please do respond to any queries or requests from the PF authorities promptly. The timeline for processing your PF request depends entirely on the accuracy and completeness of the information you provide and your prompt responses.

We highly encourage all our employees to proactively manage their PF accounts in accordance with the regulations set forth by the relevant authorities.