

Branch Name \_\_\_\_\_

 SOL ID    

 Date        

Program Type: (Priority / Burgundy / Burgundy Private) \_\_\_\_\_

 Request Type: Addition  Deletion 

Program Type	Program Eligibility Criteria
<b>Priority</b>	Average Quarterly Balance (AQB) of Rs. 2 Lakhs in Saving OR Rs. 4 Lakhs across Saving & Current Accounts OR Total Relationship of Rs. 15 Lakhs across Savings, Current Accounts, Fixed Deposit & Mutual fund Investments OR Rs. 50 Lakhs with Demat Account Holding value OR Priority Salary Customers are required to be receiving a net monthly salary credit of >= Rs. 1 Lakhs OR Foreign Inward Remittance of at least Rs. 20 lakhs received in Axis Bank NRI Savings Account through Wire transfer or Remit Money in last 12 months (For NRIs only)
<b>Burgundy</b>	Average Quarterly Balance (AQB) of Rs.10 Lakhs in Savings OR Rs 10 lakhs across Saving & Current Accounts OR Total Relationship of Rs.30 Lakhs OR Rs 1 Crore which includes Demat Holding. Burgundy Salary Customers are required to be receiving a net monthly salary credit of >= Rs 3 lac OR Foreign Inward Remittance of at least Rs.40 lakhs received through Wire transfer OR Remit Money in last 12 months (For NRIs only)
<b>Burgundy Private</b>	Maintain a minimum Total Relationship value (TRV) of Rs. 5 crore

**Terms & conditions (T&C's)**

- These T&C's are in addition to the existing Terms & conditions of the Family Banking Program / group (for Current Account) and are also in addition to the T&C's of the Savings / Current Account product variant. There will be no service fee for being a part of the Family Banking Program / group. In case the balance or TRV of Family / Group is not met, the service fee will be applicable as per the individual Savings / Current Account Balance product structure.
- Features, benefits, fees & charges will be as per the structure of the individual Savings / Current Account variant product structure.
- There will be no balance non maintenance charge in the Current Account listed below as long as the Primary Member is a Priority / Burgundy / Burgundy Private customer and the accounts are linked to the group. If the Primary Member in the Family ceases to be a Priority / Burgundy / Burgundy Private customer or the accounts are de-linked from the group, then requisite product level balances will need to be maintained in the Savings & Current Account individually.
- Program type will be determined basis the scheme code of the Primary Member. Primary member should mandatorily be a savings account holder.
- Grouping for Current Account will only be allowed as per matrix defined for the segment by the Bank. The Current Account can only be linked to the Group if the customer in the group is also an individual (for individual Current Account), proprietor, partner, director, beneficial owner or Karta in the entity / Current Account. The Current Account / entity will be removed from the group if the customer ceases to be an individual (for individual Current Account), proprietor, partner, director, beneficial owner or Karta in the entity. All linked savings accounts of the customer and his family will be removed from the Group and all accounts would need to maintain the balances individually as per the product variant, if the customer ceases to be an individual (for individual Current Account), proprietor, partner, director, beneficial owner or Karta in the entity / Current Account. The entity needs to inform the Bank of the change.
- Axis Bank reserves the right to change/modify the offerings of program at its own discretion, without assigning any reasons and without prior notice. Axis Bank will continue to offer you service/features which are a part of your choice of Savings / Current Account Product. Family Banking Program / Grouping will give you additional benefits over and above your product, as per the program construct. Other terms and conditions as applicable to the standard 'Savings / Current Account' will also be applicable under Family Banking Program / group.
- If the linked family members or accounts are no longer a part of the program / group they will have to maintain the balances as per the individual Savings / Current Account requirement. If the Primary Member in the Group ceases to be a Priority / Burgundy / Burgundy Private customer or if the linked family members or Current Account are no longer a part of the program or the person ceases to be a part of the Current Account they will have to maintain requisite balances individually as per their savings & Current Account requirement.
- For groups that do not meet the Priority / Burgundy / Burgundy Private eligibility criteria, Savings account of all individuals will be downgraded to the relevant product and the entity / Current Account will be removed from the group and accounts will need to maintain the balances individually as per the savings & Current Account variant. Fees and charges will apply to the accounts accordingly including balance non maintenance charges.
- Primary Members signature is mandatory every time while adding / deleting a member or a Current Account / entity. In case the primary member or add-on member is due for Re-kyc and/or holds Suspended CIF, the request will be rejected
- One Entity Customer ID can be linked to only one group
- Only select Current Account scheme codes will be eligible for grouping as per Bank's internal policy
- For details on Current Account grouping, please visit [www.axisbank.com/familybanking](http://www.axisbank.com/familybanking)
- Public Limited Companies, Trust, Association, Club & Society accounts are not eligible for grouping under Axis Bank's Program.

**Customer declaration**

1. I/We agree to the terms and conditions of the Program
2. I/We hereby confirm the role of the customer in the entity / Current Account as mentioned in the form and we would like to add or remove the Current Account (depending on request type selected above).
3. I/We hereby confirm that we will intimate the bank in case the customer ceases to be an individual (for individual Current Account), proprietor, partner, director, beneficial owner or Karta in the entity.
4. I/We agree to group the entity and list of accounts mentioned and confirm that the Current Account mentioned are under the same customer id of the entity.
5. I/We agree to collectively maintain the requisite balance / relationship value that has been defined for the Priority / Burgundy / Burgundy Private Program.

**Details of Primary Member along with details of Entity / Current Account to be added to / removed from the Group**

Family/Group ID: \_\_\_\_\_ Primary Member Savings Account number \_\_\_\_\_

Primary Member Name \_\_\_\_\_ Primary Member Customer ID \_\_\_\_\_

Entity Name \_\_\_\_\_ Entity Customer ID \_\_\_\_\_

Role of Customer in the Entity \_\_\_\_\_

(can be only an individual (for individual CA), proprietor, partner, director, beneficial owner or Karta in the entity / Current Account).  
Not Applicable if entity is being removed from Current Account

