

## BURGUNDY SIGN UP / MIGRATION FORM (INDIVIDUAL) Most Important Document

Date

### Welcome to a world of privileges.

Burgundy is a premium banking experience that is designed for the privileged few, bringing you integrated wealth management solutions, a bouquet of lifestyle privileges and more.

### The Burgundy privileges include:

- Dedicated Burgundy Relationship Manager backed by domain experts
  - Power - Packed Debit Card, Credit Cards and Forex Cards
  - Lending and Finance Solutions
- Integrated Wealth Management Solutions
  - Privileged Personal Banking
  - Customised Business Solutions

### The eligibility criteria for Burgundy, at Customer ID level or at Family ID# level is:

- Maintenance of an Average Quarterly Balance of ₹10 lakhs in the Savings Account, OR
- Maintenance of an Average Quarterly Balance of ₹10 lakhs across Savings Accounts and Current Accounts, OR
- Maintenance of a minimum Total Relationship Value^ (TRV) of ₹30 lakhs, OR
- Maintenance of a minimum Total Relationship Value^ (TRV) of ₹1 crore which includes Demat holdings, OR
- Foreign Inward Remittance of at least ₹ 40 lakhs received through Wire transfer or Remit Money in last 12 months (Only for NRI's), OR
- In case of a salaried customer, one should be receiving a net salary credit in excess of ₹3 lakhs every month in Axis Bank Salary Account

Please note that Burgundy Savings Account is mandatory for induction into Burgundy. Axis Bank reserves the right to change the benefits offered as part of the services.

<b>CUSTOMER ID 1</b> Name (as per PAN card) _____ Customer ID <input style="width: 100px;" type="text"/> PAN <input style="width: 100px;" type="text"/>	Signature
<b>CUSTOMER ID 2</b> Name (as per PAN card) _____ Customer ID <input style="width: 100px;" type="text"/> PAN <input style="width: 100px;" type="text"/>	Signature
<b>CUSTOMER ID 3</b> Name (as per PAN card) _____ Customer ID <input style="width: 100px;" type="text"/> PAN <input style="width: 100px;" type="text"/>	Signature
<b>CUSTOMER ID 4</b> Name (as per PAN card) _____ Customer ID <input style="width: 100px;" type="text"/> PAN <input style="width: 100px;" type="text"/>	Signature

I / We agree to open, and migrate all Savings Accounts (if any) under the above mentioned Customer ID to Burgundy and to all the terms and conditions listed on the back of this document.

**FOR OFFICE USE ONLY**

Burgundy Relationship Manager Name \_\_\_\_\_ Branch \_\_\_\_\_

Burgundy Relationship Manager Code \_\_\_\_\_ Signature \_\_\_\_\_

Branch Head Stamp, SS No. and Signature \_\_\_\_\_

## Terms and Conditions

1. Savings Account under the Burgundy scheme is offered, subject to the fulfillment of the mentioned eligibility criteria applicable to all existing and new customers under the Burgundy scheme. This offer is subject to review post 6 months of availing the offer based on the mentioned eligibility criteria and the bank reserves its right to review the offer in case of non-fulfillment of the eligibility criteria or revise the terms as per its discretion.
2. ^Total Relationship Value (TRV), aggregated at Customer ID level or at Family ID# level, is composed of:
  - i. Liability Relationship: Savings Account, Current Account (Individually held), Term Deposits, Recurring Deposits and / or Specified Investment Relationship, PIS accounts (for NRIs).
  - ii. Investment\* Relationship: Mutual Funds, Life Insurance (Premium), General Insurance (Premium), Private Equity Funds (Commitment amount), Structured Products, Discretionary Portfolio Management Service, Non-Discretionary Investment Advisory Service (NDIAS) and Other Alternate Assets through Axis Bank's channel partners.

\*Investment through Axis Bank to be considered.
3. #Family ID is generated at the time customer enrolls into Family Banking Program.
4. You may visit [www.axisbank.com/burgundy](http://www.axisbank.com/burgundy) to view the charges which are applicable. GST as applicable will be levied on all fees.
5. All accounts have a monthly billing cycle i.e. 1<sup>st</sup> to 30<sup>th</sup> / 31<sup>st</sup> of the month.
6. The Axis Bank Debit Card entitles you to a Personal Accident Insurance cover as well as Air Accident Insurance cover. These covers, as eligible, will be considered to be in force at the time of the incident only if you have made a successful purchase transaction with your card within 90 days to the occurrence of the accident. The incidence has to be reported within 50 days of the occurrence.
7. Update Aadhaar Number in your bank account to receive subsidies directly from Government (LPG, MGNREGA, etc.).
8. While migrating the account(s) in the system, some of the transactions might be impacted for a day within 15 days of submitting this request to the Bank in the following areas:
  - i. All transactions such as withdrawal from ATM, Debit Card swipe to the extent of free balance available in the linked Savings Account. (Free balance is the available balance in the Savings Account excluding the amount that is linked as fixed deposit).
  - ii. The transactions may be impacted in case the free balance is not sufficient, and requires drawing from the linked encash FDs while such account migration.

The bank will not be held accountable in the instance of transactions getting declined during the course and due to account migration.
9. Products / Services, including Burgundy and its benefits, offered by Axis Bank are subject to regulatory guidelines and Axis Bank's internal policy. Particulars of such products / services may vary or discontinue, if required by regulatory guidelines. Axis Bank does not undertake any liability or responsibility for such variance.
10. There will be a fee of ₹500/- applicable if the account is closed between 14 days and 12 months of account opening. No fees would be levied if account is closed within 14 days of account opening or after 12 months.
11. Axis Bank reserves the right, at its own discretion, to close the account in case a) initial funding cheque is returned / bounced and funding as per scheme code is not received within 30 days of account opening or b) Non-activated instakits in case account is not activated within 30 days once initiated for activation or c) Branch Personnel is unable to successfully verify details of the account, post providing a 30-day notice to the customer. (Not applicable for Salary & NRI account holders)
12. The Bank can at its sole discretion discontinue any service partially / completely or change fees by giving prior notice.

Disclaimer: Accounts of customers who do not maintain any one of the mentioned eligibility criteria will be converted to a normal category Savings Account with appropriate advance intimation. Fees and charges of the respective Savings Account will apply accordingly. Axis Bank reserves the right to change / modify the offerings of Burgundy or re-classify the customer to a segment other than Burgundy, at any time, at its own discretion without assigning any reason and without prior notice. By availing any services, the customer agrees to remain bound by the Terms and Conditions as mentioned on the website ([www.axisbank.com](http://www.axisbank.com)).

Customer 1 Signature

Customer 2 Signature

Customer 3 Signature

Customer 4 Signature