



Wealth Management | Axis Bank

ELIGIBILITY CRITERIA

Terms & Conditions apply

BURGUNDY ELIGIBILITY

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On-boarding criteria:

Initial funding cheque amount of ₹5 lakhs or more

On going eligibility criteria, calculated at a Customer ID level or Family ID# level:

- 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
- 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, OR
- Foreign Inward Remittance of at least ₹40 lakhs received through Wire transfer or Remit Money in last 12 months (Only for NRI's)

Average Quarterly Balance (AQB) is calculated by taking average daily balance of the last three months.

Please note that Burgundy Savings Account is mandatory for induction into Burgundy.

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TOTAL RELATIONSHIP VALUE

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^ Total Relationship Value (TRV), aggregated at Customer ID or Family ID# level, is composed of :

Product / Relationship	Inclusions Allowed
Liability Relationship	Savings Account, Current Account**, Term Deposits, Recurring Deposits and/or Specified Investment Relationships, PIS Accounts (for NRI's)
Investment* Relationship	Mutual Funds, Life Insurance, Private Equity Funds (Commitment amount), Structured Products, Discretionary Portfolio Management Service, Non-Discretionary Portfolio Management Service, RBI Bonds, PPF, NPS and other Alternate Assets

Accounts of customers who do not maintain any one of the mentioned criteria will be converted to a lower category Savings Account with appropriate advance intimation; fees and charges of the lower SB A/c will apply accordingly.

^ Total Relationship Value (TRV) is required to be consistently maintained throughout the month to meet Burgundy program eligibility criteria

*Investment through Axis Bank to be considered

#Family ID is generated at the time customer enrolls into Family Banking Program

**Subject to family banking / grouping & applicable only for Resident individual, Sole Proprietor, HUF, Partnership, LLP, Private Limited Companies

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FAMILY BANKING

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Burgundy customers can extend their exclusive Burgundy privileges to their family members, as under:

- Customers can include additional 5 family members in the Family Banking program
- Not individually, but as a family unit, these customers together would need to maintain the Burgundy eligibility criteria
- All family members can avail of the Burgundy privileges if they hold a Burgundy Savings Account

THANK YOU

For more details, visit: axisbank.com/burgundy

Terms and Conditions mentioned in the eligibility criteria are subject to modification from time to time, solely at Bank's discretion.