

## Burgundy Sign Up / Migration Form (Individual) Most Important Document

### 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:

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

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

**Or**

#### Maintenance of an Average Quarterly Balance of ₹ 10 lakhs across Savings Accounts and Current Accounts

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

**Or**

#### Maintenance of a minimum Total Relationship Value^ (TRV) of ₹ 30 lakhs

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

**Or**

#### Maintenance of a minimum Total Relationship Value^ (TRV) of ₹ 1 crore which includes Demat holdings

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

**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)**

### Section 1 – Primary Customer Details

Customer Name:

Customer ID (Existing, if any):  Label Code (For upmigration only):

### Section 2 – Other Family Members (Applicable for upmigration only)

<p><b>Customer ID 2</b></p> <p>Name (As per PAN Card): <input type="text"/></p> <p>Customer ID: <input type="text"/></p> <p>PAN: <input type="text"/></p>	Signature
<p><b>Customer ID 3</b></p> <p>Name (As per PAN Card): <input type="text"/></p> <p>Customer ID: <input type="text"/></p> <p>PAN: <input type="text"/></p>	Signature
<p><b>Customer ID 4</b></p> <p>Name (As per PAN Card): <input type="text"/></p> <p>Customer ID: <input type="text"/></p> <p>PAN: <input type="text"/></p>	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: \_\_\_\_\_

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\*\*, Term Deposits, Recurring Deposits and / or Specified Investment Relationship, PIS accounts (for NRIs)
  - ii. 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 through Axis Bank's channel partners

\*Investment through Axis Bank to be considered. \*\*Subject to family banking / grouping & applicable only for Resident individual, Sole Proprietor, HUF, Partnership, LLP, Private Limited Companies
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
13. For account opened through insta-kit, I / We agree to opt for insta-debit card (Savings / Salary) as well as personalised debit card (Savings / Salary). I / We accept the terms and conditions pertaining to the debit card. For details, please check T&C at <https://www.axisbank.com/retail/cards/debit-cards>

<b>Joining Fee</b>	NIL
<b>Annual Fee*</b>	NIL
<b>Card Replacement Fee</b>	NIL

\*Annual Fees of ₹ 1,500 + Tax shall be applicable on account down-migration to lower segment

- Joint holder will be charged as per charges mentioned on the website
- All debit cards will be hotlisted at the time of account migration to BSBDA schemes
- Upon account downgrade to other schemes: customer is suggested to apply for default debit card as per their new scheme to get the most relevant offers and benefits pertaining to the account proposition. In case a customer is holding a Non-default debit card post account down migration, charges will be levied on the account based on the card variant and scheme.
- Upon account upgrade to other schemes: All the accounts which have an existing Debit card will be upgraded & replaced with the applicable variant. In case a customer is holding a Non-default debit card post account up migration. No additional debit card fee related charges will be levied on the account based on the old card variant.

14. For Burgundy Salary Account, I / we hereby provide my / our irrevocable consent to Axis Bank to share and disclose my [bank account no, name, PAN details, IFSC Code, Branch Name & Account opening date] with my current employer as indicated by me in the Account Opening Form, for the purpose of salary credit

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))

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