

Tell me more

I am interested in knowing more about the following products.

- Banking : Savings Deposits Pension A/cs Business Banking
- Investments : Mutual Funds IPOs Bonds Demat
- Insurance : Life Insurance General
- Asset Products : Home Loan Personal Loan Loan Against Property
 Education Loan Loan Against Securities
- Card Products : World Currency Card Gift Card Cash Card
- Others : Foreign Currency Travellers Cheques

You are welcome to avail of the IDBI Royale Banking Services by fulfilling the following criteria:

Maintain AQB of Rs. 3,00,000/- or more in Savings Bank Account (SB) OR

Maintain AQB of Rs. 3,00,000/- or more in Individual Current Account

Mention cust ID
in case of existing customer

Photo
(Primary A/c Holder)

Mention cust ID
in case of existing customer

Photo
(Joint A/c Holder 1)

Mention cust ID
in case of existing customer

Photo
(Joint A/c Holder 2)

I/We wish to avail of the doorstep banking services as an when they are made available by the bank.

I am interested in availing of the Investment Advisory Services offered by the bank.
Please send me more information

I/We would like to register for SMS Alerts Bill Pay Phone Banking
 I-net Banking Statement by E-mail

I/we have read and understood the terms & conditions governing the product & services as also the List of benefits including the clause on downgradation and I/we agree to abide by them. I/we also agree to maintain the required balances as described in the eligibility criteria for enrollment into the Preferred Programme and for availing of the above services. I/we understand that any change in terms and conditions will be communicated to me/us on my/our request.

I/we confirm that all the information furnished in this form is correct.

I/we understand that above information provided by me/us will remain confidential with IDBI Bank and the same will not be shared with any other service providers.

Signature with Name of primary account holder _____

Account No./ Customer ID of primary account holder _____

Signature with Name of joint account holder 1 _____
(in case of joint A/c)

Account No./ Customer ID of Joint account holder _____

Signature with Name of joint account holder 2 _____
(in case of joint A/c)

Account No./ Customer ID of Joint account holder _____

*All facilities of IDBI are governed by the comprehensive terms & conditions listed in terms & conditions booklet.

For Office Use

Cust_id _____ New Customer Status _____

New Scheme Code _____ RM EIN No. _____ RM User ID _____

Branch Stamp _____

Customer Relationship Form IDBI Bank Royale Account



CUSTOMER RELATIONSHIP FORM

Welcome to Preferred Banking. Please take a few minutes to help us know you better

My communication details

Name: Mr / Mrs / Ms _____

Address for correspondence _____

City _____ PIN:

Telephone No. (Res.): Telephone No. (Off):

Mobile: E-mail Id: _____

My Family & Me

Date of Birth: Marital Status: Married Single

Mother's maiden surname: _____

Name of Spouse – Mr / Mrs: _____

Date of birth of spouse: Marriage anniversary:
d d m m y y y y d d m m y y y y

Other dates important to me: 1. Occasion _____
d d m m y y y y

2. Occasion _____
d d m m y y y y

Mother Tongue: _____

Details of children:

1.Name _____

Male/Female Age: _____ Resident / Non-resident Married / Single

2.Name _____

Male/Female Age: _____ Resident / Non-resident Married / Single

3.Name _____

Male/Female Age: _____ Resident / Non-resident Married / Single

My Work Life

I am Salaried Self Employed Retired Others _____

My industry/profession Architect Banking/Finance/Capital Market Doctor Engineer
 Chartered Accountant Lawyer Others _____

Name of the organisation _____

Office address _____

City _____ PIN

Type of organisation Public Ltd. Private Ltd. Public Sector Proprietary Partnership
Others _____

My lifestyle

I like Travelling Vacationing Reading Partying Sports/Games Eating out
 Yoga/Meditation Shopping Performing Arts Photography Collection
 Fine Arts Others _____

The vehicle I drive _____

My house Owned Rented Parental Company provided Financed

My favourite cuisine Home cooked food Indian Chinese Thai French
 Italian Mexican

My preferred vacation site Hills Coastal Wild life trip Cruise Religious trip
 Health Resorts Family home

My preferred music Vocal Indian Pop Remix Ghazals Western
 Traditional Religious Instrumental Others _____

Books/Newspapers I read _____

Language in which I Prefer to read _____

Preferred topics Fiction History Personalities Inspirational
 Literature Others _____

No. of times I travel in a year Within India _____ Abroad _____

My favourite airline Within India _____ Abroad _____

I normally travel for Business Leisure Both

Education & Accomplishments

Academic Qualification Graduate Post Graduate Professional Other _____

University / College last attended _____

Batch _____

My Banking and Finance

My relationships with idbi bank Savings Bank A/c Fixed Deposits Personal Loan
 Salary Account Home Loan Current Account
 Demat Loan Against Securities Pension Account

Details of relationship _____ (Account No./Cust. Id/Application No.)

My preferred channels for banking ATM Internet banking Phone banking
 Mobile banking Branch banking

My Investments through idbi bank Mutual Funds Gov Bonds IPOs
 Insurance Infrastructure Bonds

Details of Investments _____ (Application No. And date of investment)

My other bankers

1. _____

2. _____

3. _____

My credit cards

No. of cards _____ Issuer _____ Issuer _____

My car is insured by _____

My Life Insurance Cover _____ Insured by _____

Type of policy _____

I am advised by Self Chartered Accountant Financial Advisor
 Other Banker Others _____