

Date : _____

To,
The Manager,
Kotak Mahindra Bank Ltd

Sub: - NRI Privy League Program

I / we, Mr / Ms _____ am / are NRI customer(s)
of your Bank holding Customer Relationship Number _____.

I have understood the plan options and offerings under NRI Privy League Programme

Eligibility Criteria:

Option	Privy League Plan	Eligibility Criteria	
Option 1	Prima Plan	INR 2 lac in Savings Account (SA) OR INR 5 lac in combination of Savings & Term Deposits (TD) with minimum INR 50,000 in the Savings Account.	<input type="checkbox"/>
Option 2	Magna Plan	INR 15 lac in Relationship Value with minimum INR 1,00,000 in the Savings Account.	<input type="checkbox"/>
Option 3	Optima Plan	INR 30 lac in Relationship Value with minimum INR 1,00,000 in the Savings Account.	<input type="checkbox"/>

(Please Tick the applicable eligibility criteria you fall under)

I understand that Relationship Value is calculated by combining balances held by me and my family (all members grouped under my Privy League Membership) with Bank in Savings Account, Term Deposits, Demat Account, and amounts invested by me through Bank in Insurance Premium and Mutual Funds.

I request you to enrol me/us for the NRI Privy League Programme offered by your Bank.

I also authorise the bank to obtain / share my transactions details from / with Kotak group of companies** to enable them to provide me a consolidated statement of my investments and a host of other services.

I authorise the bank to share all my transaction with the primary holder Mr / Ms _____ until further written notice given by me and the bank is not liable on account of any loss that may be suffered by sharing my details.

I understand that the primary member of this program will be Mr / Ms _____ who will be the first point of contact for all communications regarding my / our account.

I / We understand and agree that addition or deletion of any family member will happen only post receiving request and confirmation from the Key Member and an intimation to said member to that effect (who is to be added or deleted) Change in Primary member will have to be signed off by all members of the group. I understand that the bank has the right to change / redefine offer / benefits / charges for key member and associates differently. I / we understand that all information regarding the relationship is correct and the bank shall not be liable if these are found to be incorrect.

I understand that in case I / we cease to maintain the required threshold balances for Privy League Programme, my account can be re-designated to a lower plan or a regular Non Privy NRI account and

PRIVY LEAGUE



/ or non-maintenance charges will be levied in accounts held with the Primary member. I understand that the final authority to re-designate my account remains with the Bank.

I along with other family members have also read, understood and accept the Terms and Conditions of NRI Privy League Programme and that I will be eligible for benefits only if I maintain the required threshold balances at all times. I authorise Bank to share my basic personal data (Name, Phone , email and address) with its vendors / service providers and group companies** under Privy League Programme so as to help the Bank to extend the benefits covered under the Privy League Programme to me. I also confirm that I will enhance my Relationship Value (RV*) and Average Quarterly Balance (AQB) within a period of 3 months from the date of signing this letter to meet the required threshold and thereafter would maintain the eligibility on a continuous basis.

Thanking You

Name	Relationship	Type	CRN	Signature
		Primary / Key		
		Associate		
		Associate		
		Associate		
		Associate		

*Relationship/Grouping can only be done between a Spouse, Parents, Children, Grandchildren, Daughter in law*Relationship Value is the sum total of your financial relationship with Kotak Mahindra Group. This includes your savings accounts, deposits, mutual fund investments, life insurance premiums paid, Demat account holdings (with Kotak Mahindra Bank Ltd), housing loans and select structured products referred by the group

**Kotak Mahindra Prime Limited, Kotak Securities Limited, Kotak Mahindra Capital Company Limited, Kotak Mahindra Old Mutual Life Insurance Limited, Kotak Mahindra Investments Limited, Kotak Mahindra Asset Management Co. Limited, Kotak Mahindra Trustee Company Limited, Kotak Mahindra Pension Fund Limited, Kotak Mahindra (International) Limited, Kotak Mahindra (UK) Limited, Kotak Mahindra Inc., Kotak Mahindra Asset Management (Singapore) Pte Limited, Kotak Mahindra Financial Services Limited, Kotak Investment Advisors Limited, Kotak Mahindra Trusteeship Services Limited, Kotak Infrastructure Debt Fund Limited, Kotak Mahindra General Insurance Company Limited, IVY Product Intermediaries Limited and any other Company becomes part of Kotak Group in future.