

### 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  
 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 Preferred Banking Services by fulfilling the following criteria:

Maintain AQB of Rs. 1,00,000 or more in Individual Current Account (ICA) OR

Maintain AQB of Rs. 1,00,000 or more in Savings Bank Account (SB) OR

Maintain FFD/TD of Rs. 15,00,000 or more, Linked with Savings Bank Account(SB)

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/make annual investments etc. 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 \_\_\_\_\_

IDBI Bank Limited, Regd Office: IDBI Tower, WTC Complex, Cuffe Parade, Mumbai – 400005.  
Toll Free No.: 1800-22-1070 (MTNL/BSNL) and 1800-200-1947 (others). www.idbi.com

## Customer Relationship Form



# 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  Vacating  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 \_\_\_\_\_