

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 ☐ 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 _____