

A maroon square containing the word 'Burgundy' in a white serif font.

Burgundy

Wealth Management | Axis Bank

ELIGIBILITY CRITERIA

Terms & Conditions Apply

BURGUNDY ELIGIBILITY

On-boarding criteria:

Initial funding cheque amount of ₹5 lakhs or more

On going eligibility criteria, calculated at a Customer ID level or Family ID# level:

- Maintenance of an Average Quarterly Balance of ₹10 lakhs in the Savings Account, OR
- Maintenance of an Average Quarterly Balance of ₹10 lakhs across Savings Accounts and Current Accounts, OR
- Maintenance of a minimum Total Relationship Value[^] (TRV) of ₹30 lakhs, OR
- Maintenance of a minimum Total Relationship Value[^] (TRV) of ₹1 crore which includes Demat holdings, 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

Please note that Burgundy Savings Account is mandatory for induction into Burgundy

TOTAL RELATIONSHIP VALUE

^Total Relationship Value (TRV), aggregated at Customer ID or Family ID# level, is composed of:

Product/Relationship	Inclusions Allowed
Liability Relationship	Savings Account, Current Account (Individually held), Term Deposits, Recurring Deposits and/or Specified Investment Relationships, PIS accounts(for NRIs)
Investment* Relationship	Mutual Funds, Life Insurance (Premium), General Insurance (Premium), Private Equity Funds (Commitment amount), Structured Products, Discretionary Portfolio Management Service, Non-Discretionary Investment Advisory Service and Other Alternate Assets

Accounts of customers who do not maintain any one of the mentioned criteria will be converted to a lower category Savings Account with appropriate advance intimation; fees and charges of the lower SB A/c will apply accordingly.

*Investment through Axis Bank to be considered

#Family ID is generated at the time customer enrolls into Family Banking Program

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FAMILY BANKING

Burgundy customers can extend their exclusive Burgundy privileges to their family members as under:

- Customers can include additional 3 family members in the Family Banking program
- Not individually, but as a family unit, these customers together would need to maintain the Burgundy eligibility criteria
- All family members can avail of the Burgundy privileges if they hold a Burgundy Savings Account

Thank you

For more, visit: axisbank.com/burgundy

The terms and conditions mentioned in eligibility criteria are subject to modification from time to time solely at Bank's discretion.