

ANNEXURE 5 B – RV CONSENT LETTER (PRIORITY BANKING CUSTOMERS) – TO BE SIGNED BY THE KEY MEMBER

Date : _____

Kotak Mahindra Bank Ltd,
Kotak Infinity, Building no. 21, Infinity Park,
Gen. A.K. Vaidya Marg, 4th floor Zone IV,
Malad (E) , Mumbai - 400097

Dear Sir,

I/ We, M/s _____, am/are a customer of your bank having Customer Relationship Number (CRN) _____ *(for existing customers)* I/We, the undersigned, am/are initiating a relationship with your Bank and have applied for opening an account vide Account Opening Form no. _____ *(for New to Bank Customers)*

I/We would like to join the Privy League Program offered by your Bank.

I/We have understood the plan options under Privy League namely Privy League – Prima and Privy League – Optima and that the **Privy League Prima plan** is available at a Relationship Value (RV) of Rs. 5 lacs and **Privy League Optima plan** at an RV of Rs. 30 lacs. In addition, I/we also need to maintain an Average Quarterly Balance (AQB) of Rs. 2.5 lacs across my/our group's Current Accounts with the Bank.

I/We have understood and accept the terms & conditions of the Privy League program and that I/we will be eligible for the benefits under the Prima or Optima plan upon reaching the required RV and AQB for these plans within a period of 6 months from the date of signing this letter failing which the Bank reserves the right to review my/our program eligibility.

Thanking you,

Regards,

For Bank Use: Corporate Code (COCO) option (tick below):

WM001 (Wealth migration) ASS05 (Assets) CVG01 (Commercial Vehicle)
 Others _____

Classification Recommended (tick below): Prima Optima Email ID updated on BCIF: Yes No



BUSINESS PROCESS DOCUMENT- PRIVY LEAGUE OPTIMA BUSINESS

In case of ad-hoc migration from the Branch, please attach the approval from concerned branch manager.

Privy League Relationship Manager:

(Name, Signature & Employee Code)

Privy League Supervisor

:

(Name, Signature & Employee Code)

For PLD

:

Photograph of RM and SDO available

:

Yes

No