

CUSTOMER CONSENT FORM – CREATE/MODIFY GROUPING OF ROYALE / PLATINUM PROGRAM



Date

PRIMARY CUSTOMER DETAILS:

Name of the Primary Applicant

Customer ID *Mobile No + 91

*Email ID (In Capital Letters)

I instruct to (please tick any one option)	Family Group Variant (please tick any one option)
<input type="checkbox"/> Create a New Family Group ID	<input type="checkbox"/> AU Royale <input type="checkbox"/> AU Platinum
<input type="checkbox"/> Add New customer ID to existing Family Group ID	Mention requisite Customer IDs in the below Table
<input type="checkbox"/> Delete Existing customer ID from Family Group ID	
<input type="checkbox"/> Upgrade from AU Platinum to AU Royale	
<input type="checkbox"/> Downgrade from AU Royale to AU Platinum**	
<input type="checkbox"/> Close Existing Family Group ID**	

To avail Chartered Accountant or Company Secretary benefits under Royale savings Account Program

Kindly share your ICAI membership Number (If applicable)

Kindly share your ICSI membership Number (If applicable)

**Please note that basis downgrade of your account from Royale a new debit card as applicable on product selected by you will be issued. Your Royale debit card will be discontinued on issuance of such a card.

FAMILY DETAILS:

Sr No.	Family Member Customer ID.	Customer Name (As it is in the Account)	Relationship with Primary ID	Signature
2				
3				
4				
5#				
6#				

- Customer ID to be removed from group, In case of downgrade of group from "AU Royale to AU Platinum"

I agree to maintain the requisite balance as per the below mentioned criteria:

Family Group ID Type	Balance Requirement across all Family Members
AU Royale	Savings AMB of INR 1 Lakh or Fixed Deposit of INR 20 Lakhs (tenure >=6 months)
AU Platinum	Savings AMB of INR 25,000

Terms & Conditions:

- Non-Maintenance of AMB charges (if applicable) will be levied to the Primary Customer's account. In case of closure of Primary Customer's account, the same will be levied in the account of Secondary Customer
- I/We agree to terms and conditions as mentioned in the AU Bank Family Banking Program on the website www.au.bank.in
- I/We hereby confirm the relationship with the Primary Account Holder as mentioned in the form
- I/we agree that Primary Group member would be the first and primary point of contact for the Bank in relation to any communication / intimation with respect to the program(s)
- I/We understand that with this consent, all existing accounts (if any) in above mentioned customer id's will also be upgraded to the respective program.
- I/ We understand that with this consent, a new debit card will be issued as applicable in the respective program and existing card will be hotlisted (if any).
- In case of upgrade, no cheque book will be issued. Customers can apply for cheque book by raising service instruction.
- In case of minor, non-individual entity (except HUF), secondary/joint holders, no debit card will be issued while upgrading. Card Instruction if captured above, will be considered void.
- I/We hereby agree that all benefits extended under the AU Family Banking program are at the sole discretion of AU Small Finance Bank, which reserves the right to modify, withdraw, or change any benefit provided to the Secondary Customer under this account, as mentioned on the website www.au.bank.in
- Accounts exiting the Program will be switched to Regular Savings Account as applicable.If the primary member exits the group, the group will be considered dissolved. To create a new group, a fresh instruction must be submitted, if needed.
- In case of joint accounts, Debit card will only be issued to the primary account holder. Secondary holders can apply for the card by reaching out to their Relationship Manager/branch.
- Individual customer IDs related to the Primary Customer can be grouped under the following relationships: Spouse, Parents, Mother/Father-in-law, Children, Sister/Brother, Son/Daughter-in-law, Grandparents, Grandchildren, Sister/Brother-in-law, Niece, Nephew, and Family Trust.
- HUF Customer ID can be grouped if the Karta is part of the group in the capacity of an individual or as a Karta.
- Family trust customer ID can be grouped if the Author /Trustee/Settlor (Decision Maker) of the trust is part of the group as an individual
- Govt Institutions, NGOs, Club, Society, Public charitable institutions cannot be grouped.
- Zero AMB benefit is available to Chartered Accountants (CAs) and Company Secretaries (CSs), along with their respective eligible family members in a grouping, subject to the provision of a valid ICAI or ICSI membership number at the time of opening a Royale Savings Account.
- If a valid ICAI or ICSI membership Number is not provided, the Zero AMB benefit will not apply, and standard AMB requirements will apply as per Bank policy

Signature of Primary Customer

BANK USE SECTION

Instruction Received Date:

I certify that:

- All the relevant documents are obtained from the customer as per the policy of the Bank and the instruction is complete in all respects.
- Applicable Schedule of Charges has been explained to the customer.
- Customer has signed the instruction and supporting documents in my presence and the signature stands verified against the Bank records.

To be filled by instruction receiving staff

Emp. Name	<input type="text"/>	Signature
Emp. Designation	<input type="text"/>	
Emp. Code	<input type="text"/>	
Emp. Branch Name	<input type="text"/>	
Portfolio Code	<input type="text"/>	

To be approved by the BM

Emp. Name	<input type="text"/>	Signature
Emp. Designation	<input type="text"/>	
Emp. Code	<input type="text"/>	
Emp. Branch Name	<input type="text"/>	
Emp. Branch Name	<input type="text"/>	