

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

To,

Kotak Mahindra Bank Ltd.,

Sub: Consent for joining Privy League Optima program

I/We, the undersigned, 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 Optima program offered by your Bank.

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

I/We have also understood that the Relationship Value (RV) is a combination of the balances across all accounts and investments, made through your 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 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 Branch Use Only			
Branch Name		Parent ID	
Preferred Email ID / Mobile Number updated in BCIF:			Yes / No
Classification:	K_PLB		
RM Name and Code		RM Signature	
For Exceptions, Approvals attached			Yes / No
Signature Verified By – BOM Name and Code		Signature Verified By – BOM Signature	
Branch Manager – Name and Code		Branch Manager Signature	

CONFIDENTIAL



BUSINESS PROCESS DOCUMENT- PRIVY LEAGUE OPTIMA BUSINESS

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