

ACCOUNT UPGRADE FORM



Date
D D M M Y Y Y Y

• Please complete this form in Black Ink and in CAPITAL LETTERS or where applicable

DETAILS OF YOUR ACCOUNT

Name
 Customer ID Account No.

UPGRADE/ PRODUCT CHANGE INFORMATION

Existing Product	New Product
1 Online Savings Account <input type="checkbox"/> 25K AMB* <input type="checkbox"/> 10K AMB*	1 Savings Account <input type="checkbox"/> 25k AMB* <input type="checkbox"/> 10K AMB*
2 Online Corporate Salary Account <input type="checkbox"/> Signature Debit Card <input type="checkbox"/> Platinum Debit Card	2 Senior Citizen Savings Account <input type="checkbox"/> 25k AMB* <input type="checkbox"/> 10K AMB*
3 <input type="checkbox"/> Others _____	3 Corporate Salary Account <input type="checkbox"/> Signature Debit Card <input type="checkbox"/> Platinum Debit Card
	4 <input type="checkbox"/> IDFC FIRST Bank Staff Account
	5 <input type="checkbox"/> Others _____

Debit Card:

Do you have an existing debit card Yes No

If Yes, Note: Type of debit card that will be issued on the new product code will be linked to the savings account offering. In case an existing debit card is already issued on the account and is not in line with type of card applicable as per product offering, existing debit card will be hotlisted and a new debit card (with domestic usage) will be issued.

If No, Do you need an ATM/Debit Card Yes No

If Yes, Name on Debit Card

Do you wish your Debit Card to be enabled for international use? Yes No

Cheque Book:

Please issue payable at par cheque book

TELL US WHAT YOU DO FOR A LIVING (Only for Online Corporate Salary Account)

1) Occupation (Select Anyone)

1a) Salaried (Select Anyone) Public Private Government

Corporate Name

1b) Self Employed Professional Doctor CA Architect Lawyer Consultant Entertainment
 Alternate Medical Practitioner Beautician Others

1c) Self Employed Business Sole Proprietorship Partnership/Company No. of years in business <= 5 yrs > 5 yrs

1d) Any other Occupation Homemaker Retired Farmer Politician Student Minor

2) Source of Income Salary Business Professional Fees Investments Agriculture Family Wealth

3) Gross Annual Income (₹)

DECLARATION & SIGNATURE(S)

I/ We have read, understood and agree to the charges/costs, mentioned in the extant Schedule of Charges pertains to the banking facilities and products as well as the facilities and/or the other products which I wished to avail. This Schedule of Charges is also displayed on www.idfcfirstbank.com/soc.html

I/We, the undersigned, have read, understood and agree to absolutely and unconditionally abide by and be bound by the Terms and Conditions displayed on website www.idfcfirstbank.com as revised from time to time by IDFC FIRST Bank Limited, in relation to all of my/our accounts, for present and future, maintained/opened/to be opened with IDFC FIRST Bank Limited.

FIRST/ ONLY HOLDER	SECOND HOLDER (IF ANY)	THIRD HOLDER (IF ANY)
<input type="text"/>	<input type="text"/>	<input type="text"/>
Signature	Signature	Signature
<input type="text"/>	<input type="text"/>	<input type="text"/>
Name	Name	Name

AMB* = Average Monthly Balance in ₹



BANK USE SECTION

Service Request No. _____

Employee ID of customer _____

(Applicable in case new product code is staff account)

Payment Details:

Amount Cash (Only at the Branch) Cashier's Signature _____ Employee ID _____

Mode of IP Cheque NEFT RTGS Cheque Date

Bank Name _____ Branch Name _____

Other Details

Existing Product Code _____ New Product Code _____

Corporate Code _____ Lead Converter _____

(Applicable for all new product codes except Deposit Routing Account)

Banker Certification: Required only if existing product needs In Person Verification(IPV)

I have met the Customer at his: Residence Place of Work Other _____

I have seen and verified the original KYC documents. Copy/photo taken for record. The customer has Signed in my presence

Name _____

Date

D D M M Y Y Y Y

Employee _____

Signature

Product Code Key: 1001- Savings Account 25k with Signature DC; 1004 - Sr Savings Account 25k with Signature DC; 1006 - Salary Account with Signature DC; 1020 - Online SA with Signature DC (Pre IPV); 1086 - Online Savings 10K (Pre IPV); 1041 - Savings Regular 10k; 1042 - Savings - Senior Citizen 10k; 1023 - Salary Account with Platinum DC; 1077 - Zero Balance Savings Account with Platinum DC; 1005 - Staff Savings Account; 1053 - Online Salary with Signature DC; 1054 - Online Salary with Platinum DC