

# questions about your packaged bank account

If you're complaining about how a packaged bank account was sold, the details you give on this form will help your bank – or the Financial Ombudsman Service – better understand what's happened.

If you're complaining about anything else to do with a packaged bank account, fill in only sections A, F and G.

If you have any questions, please call the ombudsman on 0800 023 4 567 (free from landlines) or 0300 123 9 123 (charged at the same rate as 01 or 02 numbers from mobiles)

## section A: key details

**A.1 what bank or building society are you complaining about?**

**A.2 what are the last three numbers of your packaged bank account?**

<input type="text"/>	<input type="text"/>	<input type="text"/>
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**A.3 is this – or has this ever been – a joint packaged bank account?**

 yes     no

**A.4 details of the packaged bank account holder(s)**

first name	<input type="text"/>	title	<input type="text"/>	<input type="text"/>	title	<input type="text"/>										
surname	<input type="text"/>			<input type="text"/>												
postcode	<input type="text"/>			<input type="text"/>												
date of birth	<input type="text"/>															
	d	d	m	m	y	y	y	y	d	d	m	m	y	y	y	y

## section B: your packaged bank account and how it was sold

### B.1 are you complaining about how a packaged bank account was sold?

yes       no

If no, you don't need to answer any more questions – but please tell us what you're complaining about in section F.

If yes, tell us what your complaint is about here.

### B.2 when did you open or upgrade to the packaged bank account?

<input type="text"/>							
d	d	m	m	y	y	y	y

### B.3 how was the packaged bank account sold to you?

- during a meeting     over the phone     over the internet     by post  
 I filled in a leaflet     over the counter     can't remember  
 other – please give details

### B.4 did the bank or building society recommend that you took out the packaged bank account?

yes       no

please give details

**section B: your packaged bank account and how it was sold**

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**B.5 did you notice the packaged bank account fees on your statement?**

yes

no

if yes, please explain when you first noticed

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**B.6 do you still have the packaged bank account?**

yes

no

if yes, please explain why you have kept it

## section C: your circumstances when you first had the packaged bank account

these questions look at the packaged bank account's features – and whether they could have been useful to you

### C.1 before you had the packaged bank account, did you (or any account holder) ever have a free bank account in the UK?

yes     no

### C.2 when you first had the packaged bank account, did you (or any account holder) have any other packaged bank accounts?

yes     no

please give details

### C.3 when you first had the packaged bank account, was your main address (or any account holder's) outside the UK?

yes     no

### C.4 when you first had the packaged bank account, did you (or any account holder) own or drive a car or other motor vehicle?

yes     no

please give details

### C.5 when you first had the packaged bank account, did you (or any account holder) own a smartphone – with internet access and applications?

yes     no

please give details

**section C: your circumstances when you first had the packaged bank account**

**C.6 when you first had the packaged bank account, how often did you (or any account holder) go on holiday?**

	never	1 to 3 times a year	more than 3 times a year
in the UK and Europe	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
outside Europe	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
including these holidays how often did you do winter sports?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**C.7 when you first had the packaged bank account, did you (or any account holder) have any issues with your health?**

yes       no  
please give details

**C.8 when you first had the packaged bank account, were all the account holders registered with a doctor in the UK?**

yes       no

**C.9 did you (or any account holder) take out any other products with the bank or building society at the same time as the packaged bank account – for example, a credit card, loan, overdraft, mortgage or savings account?**

yes       no  
please give details

## section D: about the benefits of the packaged bank account

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**D.1** have you (or any account holder) registered for anything that came with your packaged bank account – for example, mobile phone insurance, travel insurance or car breakdown cover?

yes       no

please give details

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**D.2** have you (or any account holder) made a claim on any of the insurances that came with the packaged bank account?

yes       no

please give details

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**D.3** have you (or any account holder) used anything else – for example, a better interest rate on an overdraft or loan rate, a monthly film subscription or any other discounts?

yes       no

please give details

## section E: other insurance policies you had

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**E.1 when you first had the packaged bank account, did you (or any account holder) already have any of the types of insurance below?**

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> car breakdown cover         | <input type="checkbox"/> mobile phone insurance | <input type="checkbox"/> travel insurance          |
| <input type="checkbox"/> accidental death cover      | <input type="checkbox"/> life insurance         | <input type="checkbox"/> identity theft protection |
| <input type="checkbox"/> gadget insurance            |   |  |
| <input type="checkbox"/> other – please give details |   |  |

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**E.2 if you ticked anything, did you keep this insurance once you had the packaged bank account?**

- |                              |                             |
|------------------------------|-----------------------------|
| <input type="checkbox"/> yes | <input type="checkbox"/> no |
| please give details          |                             |

**section F: any other information**

## section F: any other information

If your complaint isn't about how a packaged bank account was sold, please explain why you're complaining about the account.

Or if your complaint is about how a packaged bank account was sold, please use this space for anything else you'd like to explain.

**section F: any other information**

A large, empty rectangular box with a thin black border, occupying most of the page. It is intended for the user to provide any other information related to the section header.

## section G: your declaration

“ I confirm that all the information I’ve given in this questionnaire is true and accurate to the best of my knowledge.

I confirm I want to make a formal complaint about the packaged bank account in line ” with the information I’ve given.

\_\_\_\_\_

first account holder name

\_\_\_\_\_

signature

d	d	m	m	y	y	y	y

\_\_\_\_\_

second account holder name

\_\_\_\_\_

signature

d	d	m	m	y	y	y	y

You (and any joint account holder) need to sign here – even if someone else is bringing the complaint to us on your behalf.

If you have an ombudsman complaint reference, please write it here

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please tick ✓ to confirm you have ...

- included everything you want to tell us about your complaint
  - signed the declaration above
  - enclosed copies of all relevant documents
- or
- not* enclosed any documents with this form