

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"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<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"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<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

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

yes

no

if yes, please explain when you first noticed

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

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

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

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

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 | | |

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

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