

Mortgage endowment questionnaire



If you think your claim falls within the guidelines given in our factsheet, please provide the following information and return this page to: FSCS, 7th Floor, Lloyds Chambers, Portsoken Street, London, E1 8BN or fax it to us on 0207 892 7301.

Your full name:	Date of Birth:
Contact telephone number:	
Your address:	

Question 1:

When did your endowment policy begin?

This information will be shown on your policy documents. We can only look at claims for compensation where the advice to take out the endowment policy was given on or after 28 August 1988.

Question 2:

What is the full name, address and the 6-digit reference number of the firm?

There is a unique 6-digit reference number given to each authorised firm by the regulator. It is sometimes called the SIB or FSA number. If you have any problems finding this number, contact your mortgage endowment policy provider. They should be able to give you the reference number for the firm you originally dealt with. If the firm that advised you is still trading, please contact the firm directly.

Question 3:

What type of claim are you making? Please tick below: (you may tick more than one box)

- | | |
|--------------------------|--|
| <input type="checkbox"/> | The risk of the endowment policy was unsuitable for me. <i>(Please provide further details of the circumstances and any documents you may have that would support your claim.)</i> |
| <input type="checkbox"/> | The endowment policy pays out ('matures') after my retirement date. |
| <input type="checkbox"/> | The endowment policy matures after my mortgage loan is due for repayment. |
| <input type="checkbox"/> | I already had an endowment policy and was advised to surrender it. |

Signature:

Date: