



Greg Vaughan Financial Services

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PAYMENT PROTECTION INSURANCE QUESTIONNAIRE

Thanks for downloading my questionnaire and showing an interest in my service. I have tried hard to make this as simple and straightforward as possible to complete. However, please do not hesitate to contact me should you have any questions at all.

On the next few pages, I would like you to provide some details about yourself and your Payment Protection Insurance policy.

This will help me to analyse your case and decide whether or not there are sufficient grounds to challenge the advice you received to commence the policy.

Please try to fill in all the boxes if you can. Also, it would be most helpful if you could write as clearly as possible. If you need extra space when answering a question, please use Section 6.

All the information you give is treated in the strictest confidence and will only be used to further your case. I never pass on any information to third parties or use it to try to sell you products or services. I am only interested in helping you recover financial losses - I'm not engaged in any other business.

Once you have completed this questionnaire, please send it to me at the following address:

Greg Vaughan Financial Services
127 Imperial Court
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Liverpool
L2 3AB

A final note: if you have anti-virus software or an automatic "junk" mail facility on your PC then please ensure it is set to accept emails from me. I correspond as much as possible by email to quicken the process and will acknowledge safe receipt of this questionnaire by this method.

Charging Plan (please retain this page for your records)

I offer a guaranteed "no win, no fee" service.

If, after analysing this completed questionnaire, I do not consider there is a decent chance of success, I will tell you so and make no charge for this analysis service.

If I do accept your case, I will only charge a fee if I win compensation or a refund of your premiums plus interest. The fee is 22.5% plus VAT of the value of the redress/compensation.

If I do not win your case, there will be absolutely no charge at all.

Confidential Questionnaire

1. Personal Details

Your name: _____

Your address: _____

Post code: _____

If your policy is in joint names:

Second policyholder's name: _____

Your email address: _____

(Correspondence will be by email as much as possible to save you time and money. Please print clearly)

Contact phone no.: _____ (include area dialling code)

Where did you find out about me? _____

If from an existing client, please quote their name and/or client reference:

2. About your PPI policy

Was your PPI policy sold in conjunction with:

A loan:

A credit card:

Other:

If 'Other' please give details: _____

What is the name of
the firm that sold the policy: _____

If you ticked "credit credit" above, have you also paid default charges
on the card (i.e. for exceeding your credit limit or not paying on time)? YES: NO:

3. More about your PPI policy

When did the policy commence (dd/mm/yyyy): _____

What is/was the monthly premium amount: £ _____

Are you still paying premiums: Yes: No:

If "No" when did you stop paying premiums (dd/mm/yyyy): _____

4. Previous complaints

Have you ever made a complaint about your policy already: Yes: No:

If 'Yes' do you have copies of your original complaint

letter and the firm's final decision letter: Yes: No:

If 'Yes' to both questions, please copy this correspondence and send it with this completed questionnaire.

5. About the advice you received

Your answers to the following questions will help me to analyse the advice you received.
If you cannot remember, don't worry - just write "Cannot recall"

Question Number	Question	Yes	No
1.	Were you self-employed (or about to become self-employed) at the point of sale?		
2.	Were you in temporary employment or working on a short-term contract at the point of sale?		
3.	Were you on sick leave or maternity leave (or about to be) at the point of sale?		
4.	Were you unemployed (or about to become unemployed) at the point of sale?		
5.	Were you fully retired from employment (or soon to be retired) at the point of sale?		
6.	If you had had previous illnesses, were you told these would not be covered by the policy should they re-occur?		
7.	Were you told you had to take a PPI policy in order to obtain a lower interest rate?		
8.	Was the cost of PPI added to your loan, meaning you paid interest on both?		
9.	Does your PPI policy expire before your loan/credit agreement ends?		
10.	Were you shown a repayment schedule with and without PPI so you could decide whether or not to pay for it?		
11.	Were all the exclusions (preventing a successful claim) explained to you?		
12.	Did you have redundancy terms set out in the terms and conditions of your employment?		
13.	Did you have your entitlement to sick pay set out in the terms and conditions of your employment?		
14.	Could your partner (if any) have been able to afford the repayments had you been unable to do so for any reason?		
15.	If your PPI policy includes life cover, did you need this additional benefit? (Leave this question blank if your PPI policy does not include life cover.)		
16.	Did the vendor disclose the commission they would earn on the PPI policy?		
17.	Were you informed over 80% of claims under PPI policies are rejected?		
18.	Were you told your claim would be rejected if you were able to do any type of work, not just your own usual occupation?		
19.	At the time of sale, did you already have a Payment Protection Policy in force?		

6. Please use this space for any other comments you would like to make: