

# Prepare for your visit to your bank using this questionnaire

## Your accounts

- Are there any powers of attorney or similar that you need to revoke or change?
- Do you hold joint current and/or savings accounts? What do you use them for?
- Do you both have bank cards for the joint accounts?
- Do you have credit cards? What do you use them for?
- Are there any standing orders or direct debits that you need to change or stop?

## Your assets

- Is there a safe deposit box?
- Are there any investments or similar? Do you want to keep them or sell them?

## Your children

- Do you have accounts for your children? (in their name, in your names or in both your names)
- Do you have savings plans for the children? Do you want to open a new savings plan in your own name?

## Your home

- Do you have a mortgage in both of your names?

### What do you plan to do?

- We will keep the house in both of our names.
- We will sell the house and pay off the mortgage.
- One of us will take over the house.
- Is there an outstanding balance insurance linked to the mortgage?
- Do you have a home insurance policy?

## Your insurance policies

- Who will take over the car and its insurance?
- Do you have family insurance? Does this need to be adjusted?
- Do you have life or death insurance with your ex-partner as a beneficiary? Does this need to be adjusted?

### Your professional activity

- Do you hold accounts for professional purposes?  
Are these also in your ex-partner's name? Does he or she have power of attorney over these accounts?  
Does this need to be adjusted?
- Do you have insurance for professional purposes? Does this need to be adjusted?
- Do you have any loans for professional purposes? Does this need to be adjusted?

### Your loans

- Do you have a cash reserve together? Will one of you take this over?
- Do you have a car loan together? How will you continue to pay this off?
- Do you have any other loans? What are they?

#### What do you want to do?

- Repay early.
- Continue to pay off together until expiry date.
- Do you have any death insurance linked to one of your loans?