



Member Kudos, Feedback and Concerns Process

Connecting and understanding our members and customers is key to us delivering remarkable experiences. Sharing your stories helps us to understand where we are getting things right and perhaps, where we have opportunity to improve to ensure we meet Albertan's needs.

We hope you are delighted by the experiences we create however, we know that sometimes things can go wrong. Whether you have kudos to share, or suggestions for how we can improve, we would love to connect.

Sharing your Kudos and Feedback

Let us know what is going well or any suggestions you have.

Email	myexperience@connectfirstcu.com
Phone	1.866.923.4778
Online Form	Connectfirstcu.com/en/contact
Mail	Connect First Credit Union Member Experience Strategies 200-2850 Sunridge Blvd NE Calgary, AB T1Y6G2

For kudos, please share the name(s) of the team members involved – we can't wait to recognize them!

Addressing Concerns

When sharing your experience, it's best to start where the issue began – with the branch, investment advisor or with the contact centre for example. We take complaints very seriously and you have our commitment to lean in to make things right and retain your and all members confidence.

- **We commit to respond to your complaint within 24 hours of receipt** to acknowledge your complaint, and wherever possible strive for immediate resolution.
- If further investigation is required (this is sometimes the case), we will keep you in the know as to who is reviewing the concerns and anticipated resolution times.

To ensure we have the best opportunity to help you, we encourage you to follow the complaint process highlighted below. Ahead of connecting, try and put together any relevant paperwork or information. When we connect, will ask you to share the details. Items to consider include:

- Your Name and address
- Your preferred method of communication (for fastest resolve, we recommend sharing your phone number and email)
- Details around your experience – date, circumstances, and people
- What action you would like us to take.

Step 1: Sharing the experience with the front-line team

When sharing your experience, it's best to start where the issue began – with the branch, investment advisor or with the contact centre for example. Our leaders will be sure to make themselves available to hear your experiences. Our team members are empowered to handle nearly all concerns that are shared their way. The branch team will work diligently to resolve your concerns.

Step 2: Escalating your concerns to a department or area manager

If we are unable to resolve your concerns at the branch or department level, you will be connected with the appropriate area manager or department manager.

Concerns can be escalated by reaching out anytime to myexperience@connectfirstcu.com or by requesting a call back from our Manager, Member Experience Strategies.

Again, we commit to respond within one business day.

Step 3: Connecting with Manager, Member Experience Strategies

We are confident most concerns will be resolved in Steps 1 or 2 however, if you are not satisfied concerns can be escalated by reaching out anytime to myexperience@connectfirstcu.com or by requesting a call back from our Manager, Member Experience Strategies. They will work with you and where necessary, connect you with the appropriate senior leader in the process.

We are confident most concerns will be resolved in Steps 1 or 2 however, if you are not satisfied after your concerns were escalated or wish to share your concerns further with a member of our Senior Leadership Team – we will connect you.

Email	wellington@connectfirstcu.com
Phone	1.866.923.4778
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Step 4: Contact the Ombudsman for Banking Services and Investments

If we are unable to resolve your concerns, The Ombudsman for Banking Services and Investment (OBSI) may be able to provide you with an independent and impartial avenue to resolve concerns. They are an independent federal organization that investigates consumer complaints against financial services providers. This service is free of charge.

Website: www.obsi.ca

Mail:
401 Bay Street, Suite 1505
P.O. Box 5
Toronto, Ontario M5H 2Y4
Toll-free: 1.888.451.4519

E-mail: ombudsman@obsi.ca

Thank you for sharing your experience and giving us the opportunity to make things right and to be better for you, all members and Albertans. We appreciate you.