

ATB client feedback policy

ATB strives to put our clients at the centre of everything we do. This starts with listening.

We genuinely welcome your feedback; in fact, we embrace it, because it helps us continue to evolve banking and deliver exceptional client experiences. If you have a complaint or suggestion as to how we can improve, please let us know. If we've done something great, we'd love to hear about that too! When you let us know how we're doing, we can better serve you.

Concern Resolution Process

All investigations follow the same process.

Level 1: Branch Managers/Account Managers

Branch managers and/or Business and Agriculture leaders are often able to resolve client issues quickly and effectively. As a first step, it is suggested you give them an opportunity to hear your feedback and understand your concern. They may have a quick solution.

If your concern is not resolved through this conversation, you can escalate your complaint to Service Excellence. You can reach the Service Excellence team by phone, email or feedback form

- [Service Excellence Feedback form](#)
 - **1-844-392-9359**
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Level 2: Service Excellence

Once received, your concern will be assigned to the Service Excellence team. A team member will connect with you to discuss your concern in detail and provide you with their direct contact information.

The Service Excellence team will investigate your concern in collaboration with the managing Vice President. They will ensure that a fair and unbiased review of your concern is completed and that a full explanation of the final outcome is provided to you.

If you are not satisfied with the outcome at this level, the issue can be escalated through Service Excellence to the Director of Client Relations.

Level 3: Client Relations

Client Relations will conduct a formal investigation of the concern and give all involved parties an opportunity to share their understanding of the issue. Once the investigation has been completed, a recommendation will be provided to those involved.

Client Relations has the authority to respond on behalf of ATB's President and Chief Executive Officer. Client Relations also has access to all information related to a concern and has the authority to reverse previous decisions.

Investigation fundamentals and commitments:

- You will be provided contact information to deal directly with Client Relations
- The investigation will be fair and unbiased.
- The investigation will be performed promptly.
- The outcome will be explained thoroughly and delivered in a timely manner.

If you feel the review completed by Client Relations was not fair the matter can be escalated to the Alberta Ombudsman.

Alberta Ombudsman

As a Crown Corporation with an independent Board of Directors, the operation and management of ATB Financial is conducted at arm's length from the provincial government. As such, clients have the opportunity to consult the Alberta Ombudsman if they are not satisfied with the review conducted by the office of Client Relations.

The Alberta Ombudsman is mandated to determine administrative fairness and investigate written complaints from individuals who feel they have been treated unfairly by an administrative decision, act, omission or recommendation of an Alberta Government department, board, agency or commission, and some other professional organizations.

Clients can contact the Alberta Ombudsman via mail, phone or fax at the following:

In Edmonton

Alberta Ombudsman
9925 - 109 Street NW, Suite 700
Edmonton, AB T5K 2J8
Phone 780-427-2756
Fax 780-427-2759

In Calgary

Alberta Ombudsman
#2560 801 - 6 Avenue SW
Calgary AB, T2P 3W2
Phone 403-297-6185
Fax 403-297-5121

Toll free 1-888-455-2756