

# ATB customer feedback policy

## **ATB strives to do things differently and that starts with listening to our customers.**

We genuinely welcome your feedback; in fact, we embrace it, because it helps us continue evolving in making banking better. If we've done something great, let us know. If we could use a little improvement, we want to know about that too. When you let us know how we're doing, we can better address your concerns and respond to your needs.

### **Submitting your feedback is easy.**

- Contact ATB Client Care at 1-800-332-8383.
- Contact your ATB representative or local Branch Manager.

### **Concern Resolution Process**

**All investigations follow the same process.**

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#### **Level 1: Branch/Business Unit**

All concerns should be directed, first, at the local branch level. The branch manager has the authority to resolve customer issues quickly and effectively. *If you are not satisfied with the resolution provided by the branch, you may escalate your complaint to Service Excellence.*

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#### **Level 2: Service Excellence**

An ATB Experience Support Specialist can be reached at 1-844-392-9359 and will make all attempts to address your concerns. If the matter requires escalation, they will engage the Service Excellence team and your concern will be investigated in collaboration with the managing Vice President. *If you are not satisfied with the outcome at this level and the decision of the Vice President, the issue can be escalated to the Director of Customer Relations.*

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#### **Level 3: Director, Customer Relations**

The Director, Customer 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 Director, Customer Relations, has completed the investigation, he/she will provide a recommendation to those involved.

The Director, Customer Relations—appointed by the President and Chief Executive Officer—has the authority to respond on his/her behalf. He/she also has access to all information related to a concern and has the authority to reverse previous decisions.

Director, Customer Relations' investigation and response may take up to 30 days. This timeline is subject to:

- The involved parties' ability to provide timely information.
- The complexity of the issue.
- The volume of issues under investigation

#### **Investigation fundamentals**

- 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.
- The customer can contact the Director, Customer Relations' office to track progress and share developments.
- The customer will be referred to the Alberta Ombudsman if he or she thinks the decision is unfair.

**To reach the Director, Customer Relations, contact 1-844-392-9359 or [serviceexcellence@atb.com](mailto:serviceexcellence@atb.com).**

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#### **Alberta Ombudsman**

If a customer has exhausted all other means, he/she has the option to write to the Alberta Ombudsman with his/her concern.

Since June of 1996, ATB Financial has operated under an independent Board of Directors, and became a provincial Crown Corporation in October of 1997. The operation and management of ATB Financial is conducted at arm's length from the provincial government. As a result, customers have the opportunity to contact the Alberta Ombudsman, if they feel that the decisions of the Director, Customer Relations are unfair.

The Alberta Ombudsman is mandated to determine administrative fairness and investigates 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.

**Customers 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**

Phone 403-297-6185  
Fax 403-297-5121