

Chartered Banker

Customer Complaints Procedure

Our commitment to you

We are proud of our customer service levels, but realise that we don't always get it right.

If we don't meet our own high standards or your expectations, we would like to hear from you and we encourage you to tell us about any concerns or complaints you may have in order that we can put matters right.

Getting it right

We want to provide you with the best possible service, but when things go wrong we want to ensure that:

- It is as easy as possible for you to tell us about your concern or complaint
- We listen to you
- We consider how you would like us to resolve the issue
- You are satisfied with how your concern or complaint was handled
- We learn from any mistakes we make.

The next sections explain what to do if you have any concerns or complaints about the service provided to you by the Chartered Banker Institute. They also tell you about our timescales for resolution and what will happen if you are not satisfied with our response.

How and where to complain

If you're not satisfied with any aspect of our service you can tell us about your concerns or complaints in the following ways:

By **email** to: info@charteredbanker.com

In **writing** to: Head of Membership Experience and Strategy, Chartered Banker Institute, Drumsheugh House, 38b Drumsheugh Gardens, Edinburgh, EH3 7SW

If your concern or complaint relates to how your personal data has been processed or how your request for access to data has been handled then you can contact our Data Protection Representative directly by emailing data.protection@charteredbanker.com, or by any of the methods outlined above.

What happens next?

If you make a complaint, we will promptly acknowledge it to provide early reassurance that it has been received and that we are dealing with it.

How long will it take?

Our goal is to resolve your complaint as **quickly as possible**.

As such, it will be handled by staff members who have the right experience, knowledge and authority. If we are unable to immediately resolve your complaint, we will advise you and tell you how to proceed if you want to discuss your complaint further.

In the majority of cases we will be able to resolve your complaint within **14 days**. If we have not resolved it within that period we will contact you to:

- Explain why we have not managed to resolve the issue
- Tell you who is dealing with your complaint and how to contact them
- Obtain any further information which will help us to resolve your complaint.

We will keep you informed of progress on a regular basis until your complaint has been resolved. In exceptional circumstances where your complaint is particularly complex, matters may take longer to resolve.

In the unlikely event that we cannot resolve your complaint within **eight weeks**, we will write to you giving reasons for the delay in resolving your complaint. This letter will also give you an indication of when we expect to reach a conclusion or, where appropriate, we will send a “final response” letter that will explain our final position.

What if you are dissatisfied with our response?

If you are unhappy with our decision or explanation, you can ask that your case is reviewed at a higher level within the Institute, this normally means at director level. Your complaint will then be re-investigated fully and we will keep you informed of the progress we are making.

What happens if we cannot reach agreement?

In the unlikely event that your complaint still remains unresolved, you will have the right to refer it to our Board of Trustees to request them to review your case. The Board is ultimately responsible for the management and administration of the Institute.

You will receive further details of this final appeals process if appropriate and will have six months from the date of our “final response” letter to ask them to carry out a final review.