

CLIENT SERVICE COMMITMENTS

Client Service Categories

Response Times

Client Service Categories	Response Times
Administration (Type A) eg. Requests that <u>will not</u> involve research or involvement with head office.	
Cheque Request	eg. 24 hours
EFT Request	
PAC Change	
<enter topic 4>	
<enter topic 5>	
Miscellaneous Admin Type A	
Administration (Type B) eg. Requests that <u>will</u> involve research or involvement with head office.	
Statement seems wrong	
Cheque/EFT not received	
Open new account	
<enter topic 4>	
<enter topic 5>	
Miscellaneous Admin Type B	
Investment/Portfolio Queries eg. Enter your criteria here	
Portfolio Summary	
Market Concern	
Investment Idea	
<enter topic 4>	
<enter topic 5>	
Miscellaneous Investment/Portfolio Queries	
Insurance Queries eg. Enter your criteria here	
Quote	
Illustration	
Purchase	
<enter topic 4>	
<enter topic 5>	
Miscellaneous Insurance	
Personal Planning/Finance Queries eg. Enter your criteria here	
Year-to-date tax status	
ESP Decision	
Valuation upon death	
<enter topic 4>	
<enter topic 5>	
Miscellaneous Planning/Finance Queries	