Klarstig

Financial Services Service Complaint

Explain the concern, its effect and the resolution you are seeking. Include specific dates and facts so the receiving team can investigate fairly.

Contact and reference

Organization using this document

Your name or contact reference *

Email for a reply if needed

Information for this document

Main concern *

Date or period concerned *

Relevant order case or relationship

How this affected you or your organization *

Steps already taken

Outcome you would like *

Preferred response method

- ☐ Email
- ☐ Phone
- ☐ Written letter
- ☐ No reply requested

Specific details

Service type provider and reference

Complete when relevant to this request.

Expected scope location timing and service requirements

Operating context

Service area and case reference

Complete when relevant to this request.

Authorized reviewer supporting information and handling restrictions

Limitations and what needs setup

- Submitting the form records the answers in your workspace. It does not approve, schedule, charge or reply on its own unless you add that step to the workflow.
- Email notifications, approval routing, document generation and connections to other systems are available but not switched on until you configure them.

Want help tailoring this form? Free, Starter and Pro include five personal setup sessions, up to 30 minutes each, per new organization.

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