Complaints

Our Commitment to You

Your advisor is part of the CustomPlan Financial Managing General Agency. At CustomPlan Financial, we strive to provide outstanding customer service and high-quality products. Your feedback is incredibly important to us, and we view complaints as an opportunity to improve and better serve you. If something isn't right, we want to hear about it so we can make it right.

We take every complaint seriously and handle it with respect, confidentiality, and urgency. Our goal is to ensure that any concerns you raise are addressed fairly and efficiently.

We uphold the following principles in all our business practices:

- Fair competition, ensuring access to reasonably priced products and services.
- Honest and transparent advertising.
- Clear and straightforward contracts without unnecessary restrictions.
- Fair and reliable underwriting practices.
- Prompt and accurate claims processing without unnecessary delays.
- Knowledgeable, skilled, and courteous service from our team.
- Respecting your privacy by using personal information responsibly and securely.

How We Handle Complaints

If you have a complaint, here's what you can expect:

1. Acknowledgment within 24 hours - We will forward your complaint to the appropriate person and confirm that we've received it. You'll also receive information on our resolution process and how to escalate your concern if needed.
2. Escalation, if necessary - If your concern isn't resolved to your satisfaction, a supervisor or manager will step in to review it thoroughly.

3. Final Response - Once the review is complete, we will provide you with a written response outlining our final decision.

How to Submit a Complaint

We handle complaints in writing through our group office. You can reach us by email at info@customplanfinancial.com.

If you're not satisfied with the outcome, you have the option to escalate your complaint further:

- For Quebec residents: Contact the Autorité des marchés financiers au Québec.
- For all clients: Reach out to the Financial Consumer Agency of Canada.

Your concerns matter to us, and we appreciate the opportunity to improve our services. Thank you for trusting us!