

Xander Wealth Complaints Procedure

Complaints Handling Policy

Our complaints policy

We are committed to providing a high-quality service to all our clients. When something goes wrong, we need you to tell us about it. This will help us to improve our standards.

If you have a complaint, please contact us with the details. We have eight weeks to consider your complaint. If we have not resolved it within this time you may complain to the trade body NACFB

What will happen next?

1. We will send you a letter acknowledging receipt of your complaint within three days of receiving it, enclosing a copy of this procedure.
2. We will then investigate your complaint. This will normally involve passing your complaint to a senior member of staff, who will review your matter and speak to the member of staff who acted for you.
3. You may be invited to a meeting to discuss and hopefully resolve your complaint. This will happen within 14 days of sending you the acknowledgement letter.
4. Within three days of the meeting, we will write to you to confirm what took place and any solutions we agreed with you.
5. If you do not want a meeting or it is not possible, we will send you a detailed written reply to your complaint, including our suggestions for resolving the matter, within 21 days of sending you the acknowledgement letter.
6. At this stage, if you are still not satisfied, you should contact us again and we will arrange for the director to review the situation.
7. We will write to you within 14 days of receiving your request for a review, confirming our final position on your complaint and explaining our reasons.
8. If you are still not satisfied, you can then contact the NACFB

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<https://www.nacfb.org/>



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