

# Complaints Analysis



Summary

Brokers

Customers



10 Jun'19 - 31 Dec'21



All Regions

50

Open Complaints

13

New Complaints

13

In Progress Complaints

8

Outstanding Complaints

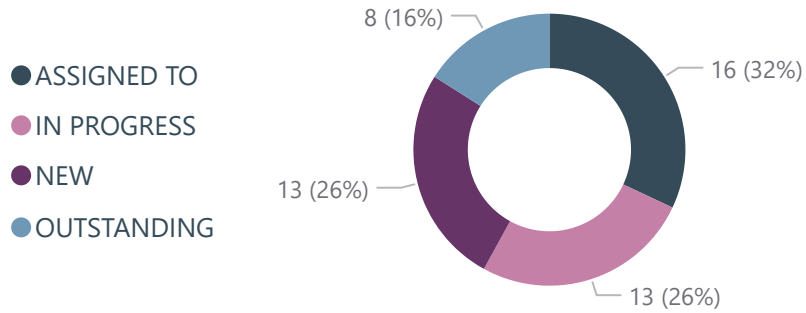
16

Assigned Complaints

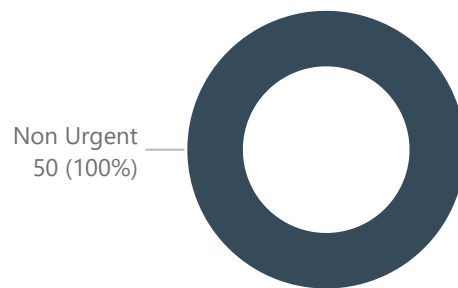
1881

Closed Complaints

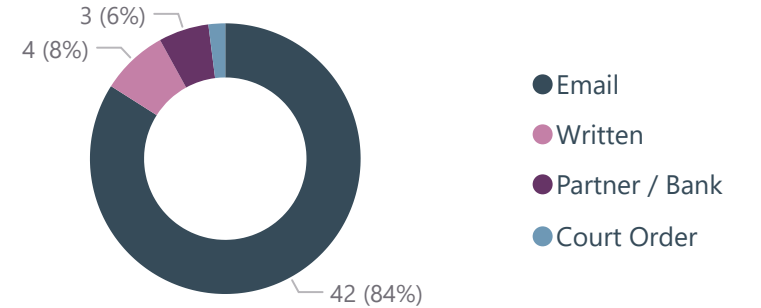
Open Complaints by Description



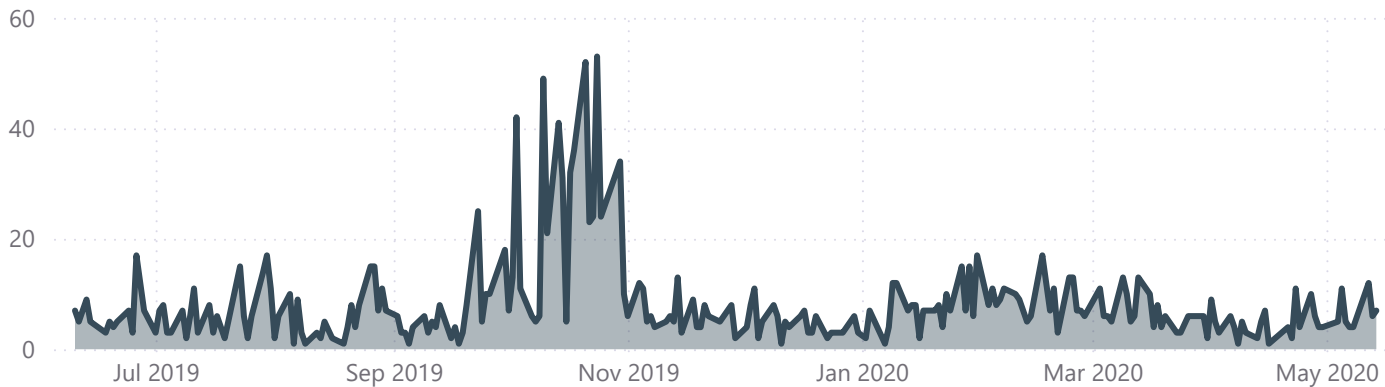
Open Complaints by Priority



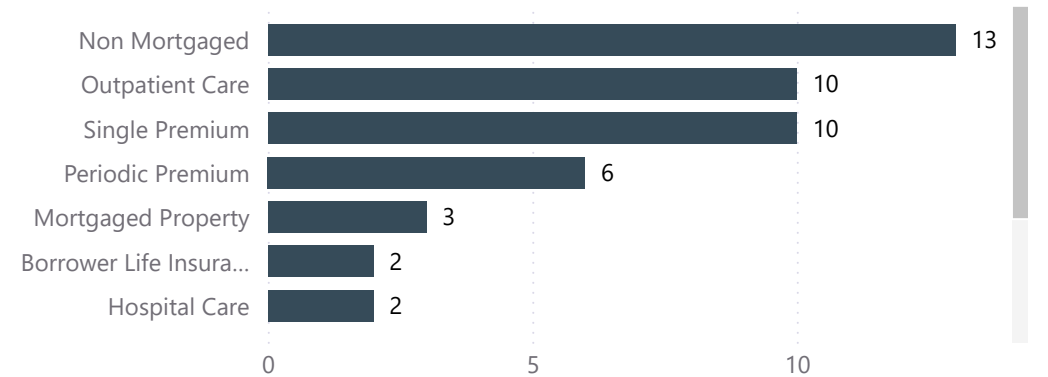
Open Complaints by Channel Type



Total Complaints by Date



Open Complaints by Product Sub-Category



# Complaints Analysis

📅

10 Jun'19 - 31 Dec'21

🌐

All Regions

Summary

Brokers

Customers

Broker

All

Status

☐ Assigned To

☐ Closed

☐ In Progress

☐ New

☐ Outstanding

Participant Type

☐ Company

☐ Individual

Product Category

☐ Business

☐ Capital Accumulation

☐ Family Protection

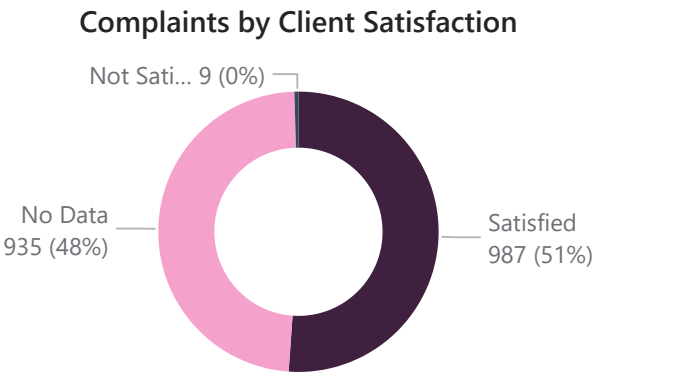
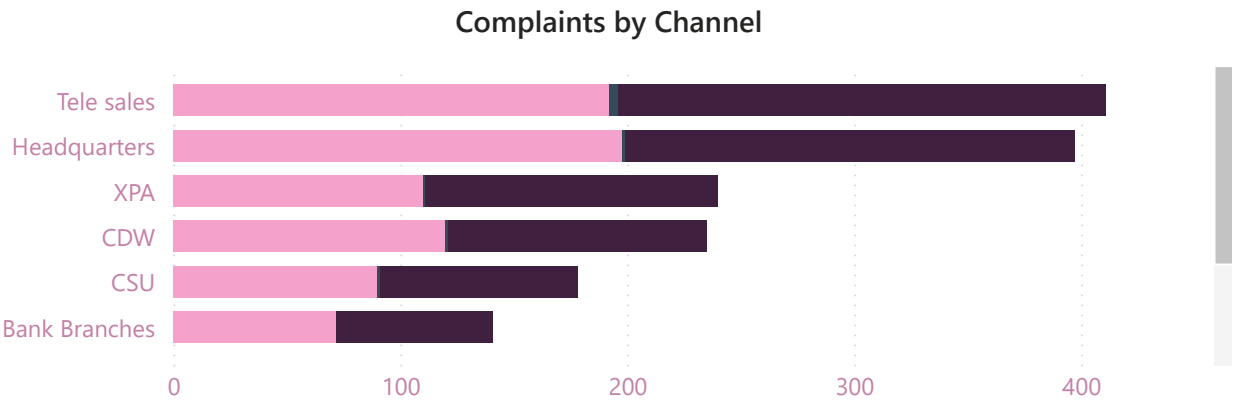
☐ Health

☐ Life

☐ Mortgaged

☐ ...

Broker	Distribution Channel	Source	Channel Type	Participant Type	Product	Last Name	Client Satisfaction
Aaron Collins	Headquarters	Company HQ	Email	Individual	CAP-025	Tina	No Data
Aaron Howard	Headquarters	Company HQ	Email	Individual	HOC-047	Christina	No Data
Aaron Morales	XPA	Company HQ	Written	Individual	CAS-065	Ruth	No Data
Aaron Stone	XPA	Company HQ	Court Order	Individual	LOL-046	Judith	No Data
Aaron Stone	XPA	Company HQ	Email	Individual	CAS-021	Stephanie	No Data
Aaron Stone	XPA	Company HQ	Written	Individual	CAP-024	Carlos	No Data
Aaron Stone	XPA	Company HQ	Written	Individual	CAS-021	Donna	No Data
Aaron Wheeler	Bank Branches	Company HQ	Written	Individual	BMB-042	Craig	No Data
Adam Dunn	Tele sales	Company HQ	Email	Individual	MOT-010	Keith	No Data
Adam Morales	Bank Branches	Company HQ	Email	Individual	CAS-014	Shawn	No Data
Adam Stevens	Headquarters	Company HQ	Email	Individual	MOT-011	Heather	No Data
Adam Stevens	Headquarters	Company HQ	Email	Individual	PNM-003	Jesse	No Data
Adam Stevens	Headquarters	Company HQ	Email	Individual	PNM-003	Jesse	No Data



# Complaints Analysis

Summary

Brokers

Customers

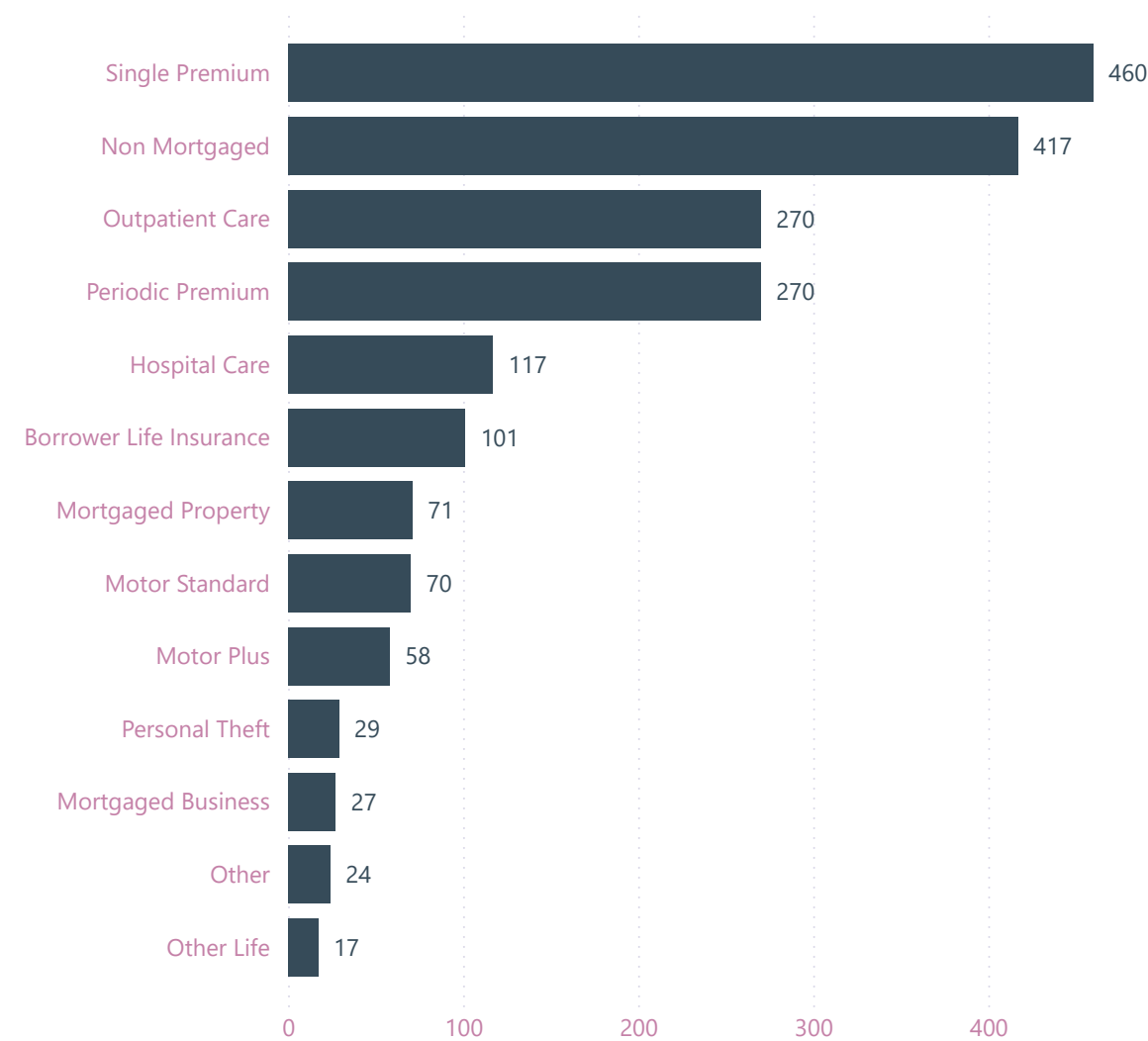


10 Jun'19 - 31 Dec'21



All Regions

Complaints by Product Sub-Category



Total Complaints - Business

Last Name	Total Complaints	ComplainDate	CompletionDate	Client Satisfaction
Bare Ltd	1	1/3/2020	1/9/2020	No Data
Baxter	1	4/6/2020		No Data
Baxter	1	3/26/2020	3/26/2020	Satisfied
China Group	1	1/31/2020	2/17/2020	No Data
China Group	1	10/24/2019	10/24/2019	Satisfied
CSL Group	1	3/5/2020	4/21/2020	No Data
Deseret	1	7/30/2019	7/30/2019	Satisfied
General Ltd	1	8/22/2019	8/29/2019	No Data
General Ltd	1	8/21/2019	8/21/2019	Satisfied

Total Complaints - Individual

Last Name	Total Complaints	ComplainDate	CompletionDate	Client Satisfaction
Barbara	1	5/5/2020	5/14/2020	No Data
Diana	1	5/14/2020	5/14/2020	Satisfied
Helen	1	5/14/2020	5/14/2020	Satisfied
Kathryn	1	3/16/2020	5/14/2020	No Data
Marie	1	5/14/2020	5/14/2020	Satisfied
Robin	1	5/14/2020	5/14/2020	Satisfied
Roy	1	5/14/2020	5/14/2020	Satisfied
Terry	1	5/14/2020	5/14/2020	Satisfied
Angela	1	5/13/2020	5/13/2020	Satisfied