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Complaint Handling Form

The information below is requested to allow us to understand concerns/complaints/issues raised by an end user regarding their account or the product. The data provided will be used by our Compliance Team to review the matter and help address the matter to find a timely resolution for the end user. If you have any questions, please contact us at [support@productfy.io](mailto:support@productfy.io). Thank you

| **Complaint Number: (assigned by Program Manager)** |  |
| --- | --- |
| **Fintech Client:** |  |
| **Date Complaint Received (Client):** |  |
| **Date Complaint Received (PFY):** |  |
| **Customer Name:** |  |
| **Account Number:** |  |
| **How was the complaint received?** | * *Phone* * *Email* * *Website* |
| **Was the complaint submitted to a Regulatory Entity (Better Business Bureau, OCC, FTC, CFPB)?** | * *Yes* * *No* |
| **Fintech Client Representative:** |  |
| **Is the Complaint related to an disputed transaction? (Y/N)** | * *Yes* * *No* |
| **Is there a dispute about the processing of a transaction by us or another third party? (Y/N)**  *If another party, please provide detail* | * *Yes* * *No* |
| **Does the Complaint relate to the periodic statement? (Y/N)** | * *Yes* * *No* |
| **Description of Complaint:**  *(Provide Details of Issue or Concerns Noted in Complaint)* | |