

Member Service Charter

Our members are at the heart of everything we do. True to our cooperative values and heritage, we offer a human touch where every member is welcomed with care and attention. Our promise reflects our commitment to our members: services tailored to their financial goals and an experience that meets their expectations.



Our Purpose

Within the development of our communities, we contribute to the success of our members through our cooperative values, the quality of our offer and the excellence of our services.

We are ...

Human. Available. Connected.



Our Vision

With a dedicated team and modern digital solutions, Caisse Alliance is the preferred financial partner of its members and the key economic driver in its communities.



Our 8 core values

- Expertise, performance and quality of our products and services
- Respecting and understanding the needs of our members
- Integrity, honesty and transparency
- Listening and cooperating with our communities
- Commitment
- Collaboration and open-mindedness
- Honouring our heritage
- Teamwork and employee appreciation



Notre promesse

- To provide high quality and bilingual financial services.
- To ensure the satisfaction of our members.
- To provide our members with trained staff who will serve them with compassion, honesty and confidentiality.
- Encourage transparency, respect, courtesy and inclusion in all Caisse initiatives.
- Respect the cooperative principles.
- Solicit feedback from our members and respond promptly
- Send an acknowledgment of receipt, indicating a timeline, **within one (1) business day**, except in exceptional circumstances, following all requests for support.

Specific objectives

PROMISES	OBJECTIVES	SUCCESS INDICATORS
To provide high-quality financial services to all our members by providing them with trained staff who know how to serve with compassion, honesty, and confidentiality.	Ensure that all Caisse staff receive training on an annual basis. Manage its own training school, thereby ensuring the professional development of employees.	Require all staff to complete basic training annually.
Respect cooperative principles.	Ensure that the 7 cooperative principles are known and applied on a daily basis.	Present the 7 cooperative principles to all new employees during initial training and as part of the training school curriculum. Refer to the seven cooperative principles: The 7 cooperative principles: https://www.caissealliance.com/en/my-caisse/social-involvement/cooperative-principles/
Encourage transparency, respect, courtesy, and inclusion in all initiatives.	Develop our Market Conduct Code (MCC) and our Equity, Diversity, and Inclusion (EDI) policy.	Make the CCM and EDI Policy available to members. Market Conduct Code: https://www.caissealliance.com/en/market-conduct-code/ Annual Report and Financial Statements: https://www.caissealliance.com/en/my-caisse/who-we-are/reports/
Ensure member satisfaction by soliciting feedback and responding to it promptly.	Analyze all complaints received. Coordinate an Annual General Meeting (AGM) and Member Group Meetings (MGMs) to provide information and voting rights regarding the Caisse's strategies. Publish surveys measuring member satisfaction.	Seek feedback from members and respond to it promptly. Annual General Meeting: https://www.caissealliance.com/en/my-caisse/who-we-are/annual-general-meeting/ Our Caisse : https://www.caissealliance.com/en/my-caisse/who-we-are/our-caisse/vision-mission-values-and-priorities/

Your opinion is important to us

We encourage you to share your feedback:

1. Speak to one of our staff members at **1 888 404-2246**;
2. Share your comments with us by sending an email to solutions@caisse.coop;
3. Complete our online feedback form at <https://www.caissealliance.com/en/solutions/>.