

TDB: Customer Follow-up Request: Low score - goes to next state in 31 hours NEW



[Redacted Customer Name]

January 3, 2022, 5:16 PM EST

[Respond](#) [Assign Alert](#) [Close Alert](#) [Add Note](#)

Profile

Alert Type	[Redacted]	Response Date	01/03/2022, 05:16 PM
Alert Reopened	[Redacted]	Creation Date	[Redacted]
Survey Program	[Redacted]	Transaction entry date	[Redacted]
Sub Program	[Redacted]	TDB Customer type	[Redacted]
Survey Type	[Redacted]	Customer full name	[Redacted]
Team/Unit	[Redacted]	Email name	[Redacted]
TDB: Region	[Redacted]	Customer phone number	[Redacted]
Regional Operations Officer	[Redacted]	Customer email	[Redacted]
Market	[Redacted]	Survey Language	[Redacted]
Retail Market President	[Redacted]	TDB Survey Type	[Redacted]
Metro Market	[Redacted]	Survey Status	[Redacted]
Shop/BM Start Date	[Redacted]	Included in LEI Score	[Redacted]
Survey ID	[Redacted]		

Actions Taken

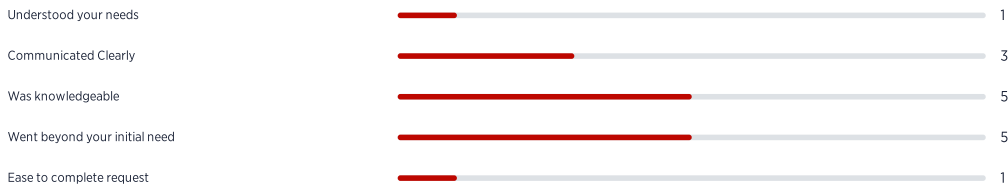
- Alert status set to New**
01/03/2022, 5:16:52 PM EST - System Generated
- Alert Created: TDB: Customer Follow-up Request: Low score**
01/03/2022, 5:16:42 PM EST - System Generated
EE/IB

Key Metrics and Attributes

LEI Score Breakdown



Attributes



Comment

Ease comment
 Keep branch is open that you have a closed

Overall Comments

When your representative called from his desk phone to your IRA department for information he was kept on hold for 35 minutes. This is totally unacceptable and that even one of your inside lines cannot get through to one of your divisions. Imagine how long it would've taken me calling from my home to get information. All of your services have gone downhill so far but I don't know how anyone can stay with your bank. I certainly have no intention of ever doing business with TD BANK in the future

Reason for Scores

You have clothes so many branches in Brooklyn New York that I am moving both my accounts and my IRA to another bank, (Santander)

Operating metrics and additional client information

Operating metrics

Immediate acknowledgement/welcome Yes No

Previous touchpoints used

None Yes No

Previous calls Yes No

Previous branch visit / interaction Yes No

Website Yes No

Mobile app Yes No

Online banking Yes No

Other: specify Yes No

Additional information

Recent store interaction In person inside the store In person at the drive-up service I did not have an interaction with a store representative

Privacy opt-ins

Privacy opt-in Yes No

TDB: Customer Follow-up Request: Low score

ESCALATED



[Redacted]

January 3, 2022, 5:16 PM EST

Respond

Assign Alert

Close Alert

Add Note

Profile

Alert Type	[Redacted]
Alert Reopened	[Redacted]
Survey Program	[Redacted]
Sub Program	[Redacted]
Survey Type	[Redacted]
Team/Unit	[Redacted]
TDB: Region	[Redacted]
Regional Operations Officer	[Redacted]
Market	[Redacted]
Retail Market President	[Redacted]
Metro Market	[Redacted]
Shop/BM Start Date	[Redacted]
Survey ID	[Redacted]

Response Date	01/03/2022, 05:16 PM
Creation Date	[Redacted]
Transaction entry date	[Redacted]
TDB Customer type	[Redacted]
Customer full name	[Redacted]
Email name	[Redacted]
Customer phone number	[Redacted]
Customer email	[Redacted]
Survey Language	[Redacted]
TDB Survey Type	[Redacted]
Survey Status	[Redacted]
Included in LEI Score	[Redacted]

Actions Taken



Reply Sent: TDB - Unsuccessful Contact Attempt

01/10/2022, 9:54:48 AM EST

Dear [Redacted]

Thank you for your recent communication regarding the consolidation of our Stores located in Brooklyn. We appreciate the time you've taken to express concern with our decision to close these locations. At TD Bank, we strive to consistently deliver legendary Customer experiences. In this instance, we fell short of your expectations. We know that these types of changes are never easy, but want to reassure you that the team of banking professionals at your new bank location is committed to delivering the same legendary Customer experiences that you have come to expect from TD Bank.

We truly value your relationship and have some convenient alternatives for you to consider, enabling you to bank at your convenience:

- Our new and improved Online Banking Site (TD Bank.com)
- Enhanced mobile banking and remote deposit capture services
- Our friendly Contact Center Team available 24 hours/day 7 days/week [Redacted]
- And, a vast network of ATMs

While electronic banking services can't replace familiar, smiling faces, we believe these options can complement your personal visits to TD Bank and would be happy to discuss them further at your convenience.

We want to make this transition as easy as possible for you. If you have any questions, please don't hesitate to call us at [Redacted]

Sincerely,

[Redacted]
 Office of the President and CEO TD Bank, America's Most Convenient Bank *
 [Redacted]
 [Redacted]



Alert Escalated

01/06/2022, 5:18:49 PM EST - System Generated



Alert Overdue

01/05/2022, 5:18:32 PM EST - System Generated



Alert status set to New

01/03/2022, 5:16:52 PM EST - System Generated



Alert Created: TDB: Customer Follow-up Request: Low score

01/03/2022, 5:16:42 PM EST - System Generated

EE/IB

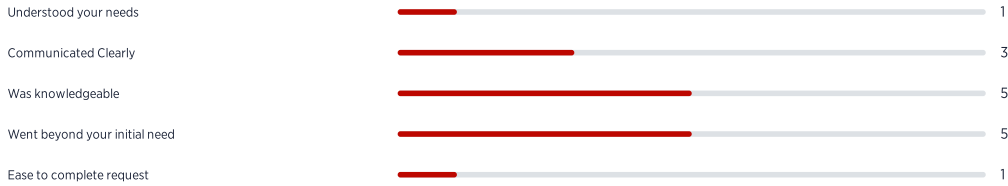
View Less

Key Metrics and Attributes

LEI Score Breakdown



Attributes



Comment



Ease comment

Keep branch is open that you have a closed

Overall Comments

When your representative called from his desk phone to your IRA department for information he was kept on hold for 35 minutes. This is totally unacceptable and that even one of your inside lines cannot get through to one of your divisions. Imagine how long it would've taken me calling from my home to get information. All of your services have gone downhill so far but I don't know how anyone can stay with your bank. I certainly have no intention of ever doing business with TD BANK in the future

Reason for Scores

You have clothes so many branches in Brooklyn New York that I am moving both my accounts and my IRA to another bank, (Santander)

Operating metrics and additional client information

Operating metrics

Immediate acknowledgement/welcome Yes No

Previous touchpoints used

None Yes No

Previous calls Yes No

Previous branch visit / interaction Yes No

Website Yes No

Mobile app Yes No

Online banking Yes No

Other: specify Yes No

Additional information

Recent store interaction In person inside the store In person at the drive-up service I did not have an interaction with a store representative

Privacy opt-ins

Privacy opt-in Yes No



January 16, 2024

Dear [REDACTED],

You matter to us. Getting things right and providing you a Legendary Customer Experience is a top priority for us. Today, we're writing to let you know that our leadership team shared your feedback regarding the unsatisfactory experiences you have encountered.

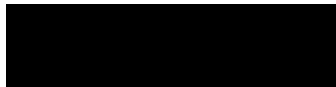
We heard your concerns and appreciate the opportunity to find a resolution.

Thank you for speaking up. Your feedback makes us better, and we want to be the best for you. We're grateful for your business, and we're here to address your concerns.

Unfortunately, our attempt to reach you on January 6th, 2022 was unsuccessful. We sincerely apologize for any inconvenience you may have experienced and truly appreciate your feedback, as it will help us work to avoid future negative customer experiences. If you would like to discuss this matter further, please contact me directly at [REDACTED].

Thank you for the opportunity to allow us to resolve your issue.

Sincerely,



[REDACTED]
TD Bank, America's Most Convenient Bank
[REDACTED]

Low EE/IB (No Store Visit) - goes to next state in 36 hours NEW



[Redacted]

January 8, 2022, 3:00 PM EST

[Respond](#) [Close Alert](#) [Add Note](#)

Profile

Alert Type	[Redacted]	Response Date	01/08/2022, 03:00 PM
Alert Reopened	[Redacted]	Creation Date	[Redacted]
Survey Program	[Redacted]	Transaction entry date	[Redacted]
Sub Program	[Redacted]	TDB Customer type	[Redacted]
Survey Type	[Redacted]	Customer full name	[Redacted]
Team/Unit	[Redacted]	Email name	[Redacted]
Employee ID	[Redacted]	Customer phone number	[Redacted]
TDB: Region	[Redacted]	Customer email	[Redacted]
Regional Operations Officer	[Redacted]	Survey Language	[Redacted]
Market	[Redacted]	TDB Survey Type	[Redacted]
Retail Market President	[Redacted]	Survey Status	[Redacted]
Metro Market	[Redacted]	Included in LEI Score	[Redacted]
Shop/BM Start Date	[Redacted]		
Survey ID	[Redacted]		

Actions Taken

- Alert status set to New**
01/08/2022, 11:30:13 PM EST - System Generated
- Alert Created: Low EE/IB (No Store Visit)**
01/08/2022, 11:30:04 PM EST - System Generated
Low EE/IB (No Store Visit)

Key Metrics and Attributes

LEI Score Breakdown



Attributes



Comment

[English](#) [Original Language](#)

Ease comment
 That they have more ATMs because with only one the queues are long in the car or decide to open the bank

Overall Comments
 Have service to be able to deposit because the queues at the bank are hours

Reason for Scores
 It is closed, no ATM and there are long queues in the car

Operating metrics and additional client information

Additional information

Recent store interaction

In person inside the store

In person at the drive-up service

I did not have an interaction with a store representative

Privacy opt-ins

Privacy opt-in

Yes

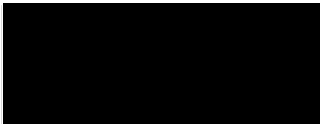
No



Bank

America's Most Convenient Bank®

January 11, 2022



Dear [Redacted]

You matter to us. Getting things right and providing you a legendary Customer experience is a top priority for us. Today, we're writing to let you know that our leadership team shared your feedback regarding your customer service experience at our 79th Street Store.

Thank you for speaking up. Your feedback makes us better, and we want to be the best for you. We're grateful for your business, and we're here to address your concerns.

Unfortunately, our attempts to reach you have been unsuccessful. Please call me at your earliest convenience so I can learn more about your issue and discuss how we can help. You can reach me at [Redacted]. Thank you for the opportunity to work toward a solution together and further serve your banking needs.

Sincerely,



Store Manager, AVP



TD Bank, America's Most Convenient Bank ®



Digital: Customer Follow-up Request: Low score - goes to next state in 78 hours NEW



[Redacted]

January 13, 2022, 3:53 PM EST

Respond | **Close Alert** | **Add Note**

Profile

Alert Type	[Redacted]	Response Date	01/13/2022, 03:53 PM
Alert Reopened	[Redacted]	Creation Date	[Redacted]
Survey Program	[Redacted]	Transaction entry date	[Redacted]
Sub Program	[Redacted]	TDB Customer type	[Redacted]
Survey Type	[Redacted]	Customer full name	[Redacted]
Team/Unit	[Redacted]	Email name	[Redacted]
Survey ID	[Redacted]	Customer phone number	[Redacted]
		Customer email	[Redacted]
		Survey Language	[Redacted]
		Survey Status	[Redacted]

Actions Taken

Alert Created: Digital: Customer Follow-up Request: Low score
 01/13/2022, 3:53:50 PM EST - System Generated
 EE/IB

Key Metrics and Attributes

LEI Score Breakdown



Attributes



Comment

Ease comment
 The tellers are just like the tellers at any other bank, ditto the managers. I have yet to understand, other than a few hours when you're open when other banks may not be, what anyone could think is exceptional about this bank.

Overall Comments
 None of this matter to me - because it's exactly the same as other banks.

Reason for Scores
 You closed my branch(Pennington, NJ) - I have to drive 15 miles to get to a branch now. Your fees are still ridiculous. There is absolutely NOTHING exceptional about TD Bank, and I'm withdrawing my money after 16 years of being a customer as soon as possible.

Operating metrics and additional client information

Privacy opt-ins

Privacy opt-in Yes No



[Redacted]

January 13, 2022, 3:53 PM EST

[Respond](#) [Reopen Alert](#) [Add Note](#)

Profile

Alert Type	[Redacted]	Response Date	01/13/2022, 03:53 PM
Alert Reopened	[Redacted]	Creation Date	[Redacted]
Survey Program	[Redacted]	Transaction entry date	[Redacted]
Sub Program	[Redacted]	TDB Customer type	[Redacted]
Survey Type	[Redacted]	Customer full name	[Redacted]
Team/Unit	[Redacted]	Email name	[Redacted]
Survey ID	[Redacted]	Customer phone number	[Redacted]
		Customer email	[Redacted]
		Survey Language	[Redacted]
		Survey Status	[Redacted]

Actions Taken

- Reply Sent: TDB - Unsuccessful Contact Attempt**
 01/25/2022, 5:10:29 PM EST [Redacted]

Dear [Redacted]

Thank you for your recent communication regarding the consolidation of our Store located at Pennington, NJ. We appreciate the time you've taken to express concern with our decision to close this location. At TD Bank, we strive to consistently deliver legendary Customer experiences. In this instance, we fell short of your expectations.

We know that these types of changes are never easy, but want to reassure you that the team of banking professionals at your new bank location is committed to delivering the same legendary Customer experiences that you have come to expect from TD Bank. We truly value your relationship and have some convenient alternatives for you to consider, enabling you to bank at your convenience:

 - Our new and improved Online Banking Site (TD Bank.com)
 - Enhanced mobile banking and remote deposit capture services
 - Our friendly Contact Center Team available 24 hours/day 7 days/week [Redacted]
 - And, a vast network of ATMs While electronic banking services can't replace familiar, smiling faces, we believe these options can complement your personal visits to TD Bank and would be happy to discuss them further at your convenience. We want to make this transition as easy as possible for you. If you have any questions, please don't hesitate to call us at [Redacted]

Jeremie Boone
Chairman's Customer Experience Officer
- Alert Closed**
 01/25/2022, 4:31:52 PM EST [Redacted]
- Case Edited**
 01/25/2022, 4:31:51 PM EST [Redacted]

Action Taken - Did you speak with the customer? - Was the customer satisfied with the result of your call? - Details of customer interaction (and/or contact attempts)

[View More](#) ▾

Key Metrics and Attributes

LEI Score Breakdown



Attributes



Comment



Ease comment

The tellers are just like the tellers at any other bank, ditto the managers. I have yet to understand, other than a few hours when you're open when other banks may not be, what anyone could think is exceptional about this bank.

Overall Comments

None of this matter to me - because it's exactly the same as other banks.

Reason for Scores

You closed my branch(Pennington, NJ) - I have to drive 15 miles to get to a branch now. Your fees are still ridiculous. There is absolutely NOTHING exceptional about TD Bank, and I'm withdrawing my money after 16 years of being a customer as soon as possible.

Operating metrics and additional client information

Privacy opt-ins

Privacy opt-in

Yes

No

Case management details

Details of customer interaction (and/or contact attempts)

SM attempted to reach the Customer, but was unsuccessful. A NCL was sent requesting contact. CSC also sent an Optimization letter.

Action Taken

Unable to reach customer (and if applicable: contact letter sent)

Did you speak with the customer?

Yes

No

Primary Root Cause of Customer's Issue

Service (Advice)

Was the customer satisfied with the result of your call?

Yes

No

Couldn't reach customer



January 25, 2022

[Redacted]

[Redacted]

We're committed to fulfilling your banking needs and delivering a legendary Customer experience. Today, I'm writing to let you know we received and appreciate your comments about East Windsor Store.

Thank you for speaking up.

We encourage our Customers to speak up and we're grateful that you did. Your feedback matters to us – and so do you. We know you have many choices when it comes to banking, and we're here to listen to you and your concerns.

Unfortunately, our attempts to reach you have been unsuccessful. Nevertheless, your concerns are important to us.

Your trust and satisfaction are important to us.

We would like to further discuss your concerns with you, so please call me at [Redacted]. Thank you for the opportunity to continue serving your banking needs.

Sincerely,

[Redacted]

[Redacted]

Store Manager
East Windsor

TDB: Customer Follow-up Request: Low score - goes to next state in 37 hours NEW



[Redacted]

January 30, 2022, 3:32 PM EST

Respond [dropdown] Assign Alert Close Alert Add Note

Profile

Alert Type	[Redacted]
Alert Reopened	[Redacted]
Survey Program	[Redacted]
Sub Program	[Redacted]
Survey Type	[Redacted]
Team/Unit	[Redacted]
Employee ID	[Redacted]
TDB: Region	[Redacted]
Regional Operations Officer	[Redacted]
Market	[Redacted]
Retail Market President	[Redacted]
Metro Market	[Redacted]
Shop/BM Start Date	[Redacted]
Survey ID	[Redacted]

Response Date	01/30/2022, 03:32 PM
Creation Date	[Redacted]
Transaction entry date	[Redacted]
TDB Customer type	[Redacted]
Customer full name	[Redacted]
Email name	[Redacted]
Customer phone number	[Redacted]
Customer email	[Redacted]
Survey Language	[Redacted]
Survey Status	[Redacted]
Included in LEI Score	[Redacted]

Actions Taken

- Alert status set to New**
01/30/2022, 3:33:00 PM EST · System Generated
- Alert Created: TDB: Customer Follow-up Request: Low score**
01/30/2022, 3:32:53 PM EST · System Generated
EE/IB

Key Metrics and Attributes

LEI Score Breakdown



Attributes



Comment

Ease comment
 The branches in my area keep disappearing and it's making it increasingly difficult to bank.

Reason for Scores
 I love the online features.

Operating metrics and additional client information

Operating metrics

Immediate acknowledgement/welcome Yes No

Previous touchpoints used

None Yes No

Previous calls Yes No

Previous branch visit / interaction Yes No

Website Yes No

Mobile app Yes No

Online banking Yes No

Other: specify Yes No

Additional information

Recent store interaction In person inside the store In person at the drive-up service I did not have an interaction with a store representative

Privacy opt-ins

Privacy opt-in Yes No



[Redacted]

January 30, 2022, 3:32 PM EST

[Respond](#) [Reopen Alert](#) [Add Note](#)

Profile

Alert Type	[Redacted]	Response Date	01/30/2022, 03:32 PM
Alert Reopened	[Redacted]	Creation Date	[Redacted]
Survey Program	[Redacted]	Transaction entry date	[Redacted]
Sub Program	[Redacted]	TDB Customer type	[Redacted]
Survey Type	[Redacted]	Customer full name	[Redacted]
Team/Unit	[Redacted]	Email name	[Redacted]
Employee ID	[Redacted]	Customer phone number	[Redacted]
TDB: Region	[Redacted]	Customer email	[Redacted]
Regional Operations Officer	[Redacted]	Survey Language	[Redacted]
Market	[Redacted]	Survey Status	[Redacted]
Retail Market President	[Redacted]	Included in LEI Score	[Redacted]
Metro Market	[Redacted]		
Shop/BM Start Date	[Redacted]		
Survey ID	[Redacted]		

Actions Taken



Reply Sent: TDB - Unsuccessful Contact Attempt

02/03/2022, 12:35:52 PM EST [Redacted]

Dear [Redacted]

Thank you for your recent communication regarding the consolidation of our Store located at Brunswick Hannaford. We appreciate the time you've taken to express concern with our decision to close this location. At TD Bank, we strive to consistently deliver legendary Customer experiences. In this instance, we fell short of your expectations. We know that these types of changes are never easy, but want to reassure you that the team of banking professionals at your new bank location is committed to delivering the same legendary Customer experiences that you have come to expect from TD Bank.

We truly value your relationship and have some convenient alternatives for you to consider, enabling you to bank at your convenience:

- Our new and improved Online Banking Site (TD Bank.com)
- Enhanced mobile banking and remote deposit capture services
- Our friendly Contact Center Team available 24 hours/day 7 days/week [Redacted]
- And, a vast network of ATMs While electronic banking services can't replace familiar, smiling faces, we believe these options can complement your personal visits to TD Bank and would be happy to discuss them further at your convenience. We want to make this transition as easy as possible for you. If you have any questions, please don't hesitate to call us at [Redacted]

Sincerely,

[Redacted]
Chairman's Customer Experience Officer



Alert Closed

02/03/2022, 12:33:05 PM EST [Redacted]



Case Edited

02/03/2022, 12:33:05 PM EST [Redacted]

Action Taken - Did you speak with the customer? - Primary Root Cause of Customer's Issue - Was the customer satisfied with the result of your call? - Details of customer interaction (and/or contact attempts)

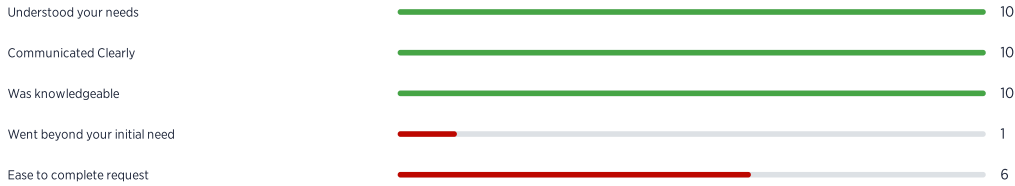
[View More](#)

Key Metrics and Attributes


LEI Score Breakdown




Attributes




Comment

 Ease comment

 The branches in my area keep disappearing and it's making it increasingly difficult to bank.

Reason for Scores

 I love the online features.

Operating metrics and additional client information

Operating metrics

Immediate acknowledgement/welcomed Yes No

Previous touchpoints used

None Yes No

Previous calls Yes No

Previous branch visit / interaction Yes No

Website Yes No

Mobile app Yes No

Online banking Yes No

Other: specify Yes No

Additional information

Recent store interaction In person inside the store In person at the drive-up service I did not have an interaction with a store representative

Privacy opt-ins

Privacy opt-in Yes No

Case management details

Details of customer interaction (and/or contact attempts)

SM [REDACTED] spoke with the Customer on 2/3 regarding her concerns. She expressed her dissatisfaction with the closing of the Lisbon and Brunswick Hannaford branch locations. She mentioned she felt as though she wasn't valued, and that the bank wasn't invested in her or the community. [REDACTED] empathized with her and reassured her that she was a valued customer. He went over digital features and shared that we are working to get deposit capabilities added to the ATM near her. He invited her to stop by the Store for a financial review as she may be able to upgrade her account to one that offers free ATM withdrawals. The Customer declined and expressed her appreciation for the call. An Optimization letter was also sent by Chairman's.

Action Taken Apologized for customer issue Found alternative solution Other

Did you speak with the customer? Yes No

Primary Root Cause of Customer's Issue Other

Was the customer satisfied with the result of your call? Yes No Couldn't reach customer



[Redacted]

February 19, 2022, 4:51 PM EST

Respond [dropdown] Assign Alert Close Alert Add Note

Profile

Alert Type	[Redacted]	Response Date	02/19/2022, 04:51 PM
Alert Reopened	[Redacted]	Creation Date	[Redacted]
Survey Program	[Redacted]	Transaction entry date	[Redacted]
Sub Program	[Redacted]	TDB Customer type	[Redacted]
Survey Type	[Redacted]	Customer full name	[Redacted]
Team/Unit	[Redacted]	Email name	[Redacted]
Employee ID	[Redacted]	Customer phone number	[Redacted]
TDB: Region	[Redacted]	Customer email	[Redacted]
Regional Operations Officer	[Redacted]	Survey Language	[Redacted]
Market	[Redacted]	Survey Status	[Redacted]
Retail Market President	[Redacted]	Included in LEI Score	[Redacted]
Metro Market	[Redacted]		
Shop/BM Start Date	[Redacted]		
Survey ID	[Redacted]		

Actions Taken

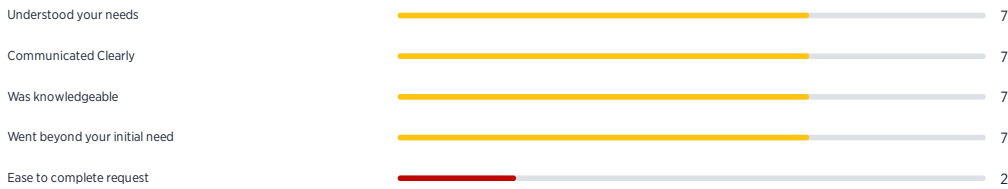
- Alert status set to New
02/19/2022, 4:51:41 PM EST - System Generated
- Alert Created: TDB: Customer Follow-up Request: Low score
02/19/2022, 4:51:29 PM EST - System Generated
EE/IB

Key Metrics and Attributes

LEI Score Breakdown



Attributes



Comment

Ease comment
Open up the Mule Rd. branch again..Now there's just an empty bank that was used by so many people who are forced to travel to another TD banks...Mule Rd. was very convenient for so many basically "seniors" in this area..

Reason for Scores

A very busy TD Bank on Mule Rd. in Toms River has been closed for a long time...Up for sale...What else can go there besides a bank???...Windows throughout the building..Made no sense to close that BUSY bank...Just to cash a check you have to travel on a busy road and it's not easy to get in and out of Manchester branch...Just waiting for a serious accident to happen...Made no sense to close that office in a HUGE senior populated area..

Operating metrics and additional client information

Operating metrics

Immediate acknowledgement/welcome Yes No

Previous touchpoints used

None Yes No

Previous calls Yes No

Previous branch visit / interaction Yes No

Website Yes No

Mobile app Yes No

Online banking Yes No

Other: specify Yes No

Additional information

Recent store interaction In person inside the store In person at the drive-up service I did not have an interaction with a store representative

Privacy opt-ins

Privacy opt-in Yes No

From: [REDACTED]
To: [REDACTED]
Subject: Your TD Bank survey
Date: Tuesday, February 22, 2022 12:27:04 PM

Dear [REDACTED],

Thank you for your recent communication regarding the consolidation of our Store located at Mule Rd. We appreciate the time you've taken to express concern with our decision to close this location. At TD Bank, we strive to consistently deliver legendary Customer experiences. In this instance, we fell short of your expectations.

We know that these types of changes are never easy, but want to reassure you that the team of banking professionals at your new bank location is committed to delivering the same legendary Customer experiences that you have come to expect from TD Bank.

We truly value your relationship and have some convenient alternatives for you to consider, enabling you to bank at your convenience:

- Our new and improved Online Banking Site (TD Bank.com)
- Enhanced mobile banking and remote deposit capture services
- Our friendly Contact Center Team available 24 hours/day 7 days/week [REDACTED]
- And, a vast network of ATMs

While electronic banking services can't replace familiar, smiling faces, we believe these options can complement your personal visits to TD Bank and would be happy to discuss them further at your convenience.

We want to make this transition as easy as possible for you. If you have any questions, please don't hesitate to call us at [REDACTED]

Sincerely,

Chairman's Service Center
Office of the President and CEO

TD Bank, America's Most Convenient Bank®

Internal

From: [REDACTED]
To: [REDACTED]
Subject: RE: Seeking answers
Date: Friday, March 11, 2022 12:05:24 PM

Dear [REDACTED]

Thank you for contacting TD regarding the Canadian truckers. We value your feedback.

TD recognizes the rights of people to express diverse perspectives on issues that are important to them.

The issue in Canada, which has been resolved, did not involve TD Bank in the U.S. The Federal Government of Canada had issued temporary orders under the Emergencies Act and all financial institutions in Canada were required to comply with those temporary measures at the time. Those temporary orders were revoked last month.

We thank you again for sharing your feedback. We forward to serving you in the future.

Sincerely,

[REDACTED] | Customer Experience Officer II
Chairman's Service Center | Office of the President and CEO
TD Bank, America's Most Convenient Bank®

From: [REDACTED]
Sent: Friday, March 11, 2022 10:35 AM
To: [REDACTED]
Subject: Seeking answers

CAUTION: EXTERNAL MAIL. DO NOT CLICK ON LINKS OR OPEN ATTACHMENTS YOU DO NOT TRUST
ATTENTION : COURRIEL EXTERNE. NE CLIQUEZ PAS SUR DES LIENS ET NOUVREZ PAS DE PIÈCES JOINTES AUXQUELS VOUS NE FAITES PAS CONFIANCE

[REDACTED]

First Horizon (Acquisition by TD in process) has a large holding of my personal assets. I am sending this inquiry as TD has recently been in the national news regarding the freezing of certain accounts in Canada and with an acquisition of my bank pending this causes me great concern.

It is difficult to ascertain the truth by simply using news stories as almost every one of them has a slant one way or the other.

So I figured it would be best to go straight to the source.

Is there any official release from TD regarding these account freezes? anything you could share would be helpful.

thx

[REDACTED]

Internal

[REDACTED]

February 23, 2022

[REDACTED]

Dear [REDACTED]

I am a customer of TD Bank. When I first moved to this area you had a branch on Mule Road in Toms River, NJ. Very convenient for a 55+ communities. My association alone has approximately 3,200 homes, and that is just one. There are many other 55+ communities in this area. Your customers now have to go to Manchester, NJ (which is not very far) or Hooper Avenue, Toms River, NJ.

Since you closed the Mule Road branch, I have been using your a branch on Route 37 Manchester, NJ. It is so overwhelmed with customers, lines fill the lobby and every seat is full waiting for service. The drive-through is not any better, maybe worse.

Please direct this complaint to the proper person to consider re-opening that branch on Mule Road or open other branch in this area.

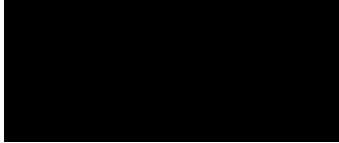
Thank you for your prompt attention.

Sincerely yours,

[REDACTED]



March 23, 2022



Dear [REDACTED],

Thank you for your recent communication regarding the consolidation of our Store located at Mule. We appreciate the time you've taken to express concern with our decision to close this location. At TD Bank, we strive to consistently deliver legendary Customer experiences. In this instance, we fell short of your expectations.

We know that these types of changes are never easy, but want to reassure you that the team of banking professionals at your new bank location is committed to delivering the same legendary Customer experiences that you have come to expect from TD Bank.

We truly value your relationship and have some convenient alternatives for you to consider, enabling you to bank at your convenience:

- Our new and improved Online Banking Site (TD Bank.com)
- Enhanced mobile banking and remote deposit capture services
- Our friendly Contact Center Team available 24 hours/day 7 days/week [REDACTED]
- And, a vast network of ATMs

While electronic banking services can't replace familiar, smiling faces, we believe these options can complement your personal visits to TD Bank and would be happy to discuss them further at your convenience.

We want to make this transition as easy as possible for you. If you have any questions, please don't hesitate to call us at [REDACTED].

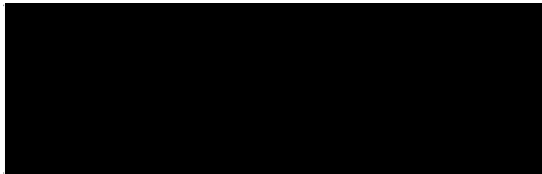
Sincerely,



[REDACTED] Chairman's Customer Experience Officer
Chairman's Services Center, Office of the President CEO

TD Bank, America's Most Convenient Bank





Attention: 

We are very disappointed that your institution decided to close the TD Bank Branch on Mule Road in Holiday City.

That Bank was always very busy. Why was it closed.

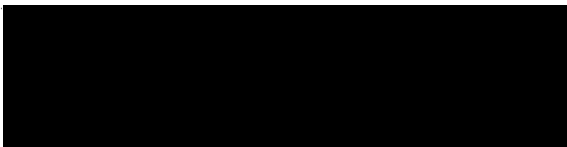
I could never understand how you could close a bank that served a senior citizen community in need of convenience. We now are sent a branch that is miles away and can only be reached by a long drive. As seniors some of us are not able to get to that branch.

Some of us have been forced to move our accounts to banks more conveniently located.

We have been loyal members of the TD Bank Institution for many many years. The last thing we want to do is move to another bank but you leave us alternative.

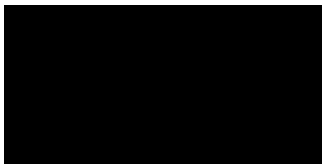
Please reconsider your decision and relocate a branch here in Holiday City. If you don't we will be forced to move all our accounts to a bank that is in the Holiday City area.

I await your response concerning this matter shortly.





March 24, 2022



Dear Mr. and Mrs. [REDACTED],

Thank you for your recent communication regarding the consolidation of our Store located at Mule Road. We appreciate the time you've taken to express concern with our decision to close this location. At TD Bank, we strive to consistently deliver legendary Customer experiences. In this instance, we fell short of your expectations.

We know that these types of changes are never easy, but want to reassure you that the team of banking professionals at your new bank location is committed to delivering the same legendary Customer experiences that you have come to expect from TD Bank.

We truly value your relationship and have some convenient alternatives for you to consider, enabling you to bank at your convenience:

- Our new and improved Online Banking Site (TD Bank.com)
- Enhanced mobile banking and remote deposit capture services
- Our friendly Contact Center Team available 24 hours/day 7 days/week [REDACTED]
- And, a vast network of ATMs

While electronic banking services can't replace familiar, smiling faces, we believe these options can complement your personal visits to TD Bank and would be happy to discuss them further at your convenience.

We want to make this transition as easy as possible for you. If you have any questions, please don't hesitate to call us at [REDACTED].

Sincerely,



[REDACTED] Chairman's Customer Experience Officer
Chairman's Services Center, Office of the President CEO
TD Bank, America's Most Convenient Bank

TDB: Customer Follow-up Request: Low score - goes to next state in 37 hours NEW



[Redacted]

March 22, 2022, 11:51 PM EST

Respond | Assign Alert | Close Alert | Add Note

Profile

Alert Type	[Redacted]
Alert Reopened	[Redacted]
Survey Program	[Redacted]
Sub Program	[Redacted]
Survey Type	[Redacted]
Team/Unit	[Redacted]
Employee ID	[Redacted]
TDB: Region	[Redacted]
Regional Operations Officer	[Redacted]
Market	[Redacted]
Retail Market President	[Redacted]
Metro Market	[Redacted]
Shop/BM Start Date	[Redacted]
Survey ID	[Redacted]

Response Date	03/22/2022, 11:51 PM
Creation Date	[Redacted]
Transaction entry date	[Redacted]
TDB Customer type	[Redacted]
Customer full name	[Redacted]
Email name	[Redacted]
Customer phone number	[Redacted]
Customer email	[Redacted]
Survey Language	[Redacted]
Survey Status	[Redacted]
Included in LEI Score	[Redacted]

Actions Taken

- Alert status set to New**
03/22/2022, 11:58:42 PM EST · System Generated
- Alert Created: TDB: Customer Follow-up Request: Low score**
03/22/2022, 11:55:54 PM EST · System Generated
EE/IB

Key Metrics and Attributes

LEI Score Breakdown



Attributes



Comment

Ease comment: Understaffed

Overall Comments: If you want to close Edgewater and Arnold location. Please have enough tellers at the annapolis location.

Reason for Scores: The people at my branch are the beats bankers I have ever had. TD closed two out of the 3 closest locations and the annapolis branch is under staffed to handle the volume. Again. This does not reflect the people there. They are great

Operating metrics and additional client information

Operating metrics

Immediate acknowledgement/welcome Yes No

Previous touchpoints used

None Yes No

Previous calls Yes No

Previous branch visit / interaction Yes No

Website Yes No

Mobile app Yes No

Online banking Yes No

Other: specify Yes No

Additional information

Recent store interaction In person inside the store In person at the drive-up service I did not have an interaction with a store representative

Privacy opt-ins

Privacy opt-in Yes No

From: [REDACTED]
To: [REDACTED]
Subject: Your TD Bank Survey
Date: Monday, March 28, 2022 11:58:00 AM

Dear [REDACTED]:

Thank you for your recent communication regarding the consolidation of our Store located at Arnold. We appreciate the time you've taken to express concern with our decision to close this location. At TD Bank, we strive to consistently deliver legendary Customer experiences. In this instance, we fell short of your expectations.

We know that these types of changes are never easy, but want to reassure you that the team of banking professionals at your new bank location is committed to delivering the same legendary Customer experiences that you have come to expect from TD Bank.

We truly value your relationship and have some convenient alternatives for you to consider, enabling you to bank at your convenience:

- Our new and improved Online Banking Site (TD Bank.com)
- Enhanced mobile banking and remote deposit capture services
- Our friendly Contact Center Team available 24 hours/day 7 days/week [REDACTED]
- And, a vast network of ATMs

While electronic banking services can't replace familiar, smiling faces, we believe these options can complement your personal visits to TD Bank and would be happy to discuss them further at your convenience.

We want to make this transition as easy as possible for you. If you have any questions, please don't hesitate to call us at [REDACTED].

Sincerely,

[REDACTED], Chairman's Service Center
Office of the President and CEO

TD Bank, America's Most Convenient Bank®

Internal

From: [REDACTED]
To: [REDACTED]
Subject: FW: Merger/acquisition
Date: Friday, April 1, 2022 7:50:17 AM

[REDACTED] | Corporate Communications Associate | Corporate and Public Affairs (CAPA) **TD Bank**, America's Most Convenient Bank | [REDACTED]
[REDACTED]

From: [REDACTED]
Sent: Thursday, March 31, 2022 11:12 PM
To: [REDACTED]
Subject: Merger/acquisition

CAUTION: EXTERNAL MAIL. DO NOT CLICK ON LINKS OR OPEN ATTACHMENTS YOU DO NOT TRUST
ATTENTION : COURRIEL EXTERNE. NE CLIQUEZ PAS SUR DES LIENS ET N'OUVREZ PAS DE PIÈCES JOINTES AUXQUELS VOUS NE FAITES PAS CONFIANCE

Not that you all will care, but we are definitely moving to a different bank due to the multiple mergers with our original bank, iberiaBank, now First Horizon. We cannot, in good conscience, do business with a bank that commits treason against its (Canadian) citizens and its neighbors (USA) at the behest of a tyrannical dictator (Justin Trudeau). We do not trust you all to protect our assets when you back tyranny.

STAY FREE

From: [REDACTED]
To: [REDACTED]
Subject: RE: Merger/acquisition
Date: Friday, April 1, 2022 8:50:56 AM

Dear [REDACTED]:

Thank you for contacting TD regarding the Canadian truckers. We value your feedback.

TD recognizes the rights of people to express diverse perspectives on issues that are important to them.

This is a TD Canadian bank issue; it does not involve TD Bank in the U.S. TD Bank in Canada wants to be certain that it is following banking laws respecting the rights of its depositors. It is common practice for banks to obtain guidance from a court when ownership of deposited funds is not clear.

In this case, multiple different parties are claiming entitlement to the funds. TD Bank in Canada submitted the funds to a court to follow Canadian law so that the funds can be distributed.

We thank you again for sharing your feedback. We value your relationship with TD Bank and look forward to serving you in the future.

Sincerely,

[REDACTED] Chairman's Service Center
Office of the President and CEO
TD Bank, America's Most Convenient Bank®

From: [REDACTED]
Sent: Thursday, March 31, 2022 11:12 PM
To: [REDACTED]
Subject: Merger/acquisition

CAUTION: EXTERNAL MAIL. DO NOT CLICK ON LINKS OR OPEN ATTACHMENTS YOU DO NOT TRUST
ATTENTION : COURRIEL EXTERNE. NE CLIQUEZ PAS SUR DES LIENS ET N'OUVREZ PAS DE PIÈCES JOINTES AUXQUELS VOUS NE FAITES PAS CONFIANCE

Not that you all will care, but we are definitely moving to a different bank due to the multiple mergers with our original bank, iberiaBank, now First Horizon. We cannot, in good conscience, do business with a bank that commits treason against its (Canadian) citizens and its neighbors (USA) at the behest of a tyrannical dictator (Justin Trudeau). We do not trust you all to protect our assets when you back tyranny.

STAY FREE

TDB: Customer Follow-up Request: Low score - goes to next state in 73 hours NEW



[Redacted]

March 31, 2022, 3:43 PM EST

Respond [dropdown] Assign Alert Close Alert Add Note

Profile

Alert Type	[Redacted]
Alert Reopened	[Redacted]
Survey Program	[Redacted]
Sub Program	[Redacted]
Survey Type	[Redacted]
Team/Unit	[Redacted]
Employee ID	[Redacted]
TDB: Region	[Redacted]
Regional Operations Officer	[Redacted]
Market	[Redacted]
Retail Market President	[Redacted]
Metro Market	[Redacted]
Shop/BM Start Date	[Redacted]
Survey ID	[Redacted]

Response Date	03/31/2022, 03:43 PM
Creation Date	[Redacted]
Transaction entry date	[Redacted]
TDB Customer type	[Redacted]
Customer full name	[Redacted]
Email name	[Redacted]
Customer phone number	[Redacted]
Customer email	[Redacted]
Survey Language	[Redacted]
Survey Status	[Redacted]
Included in LEI Score	[Redacted]

Actions Taken

- Alert status set to New**
03/31/2022, 3:44:19 PM EST - System Generated
- Alert Created: TDB: Customer Follow-up Request: Low score**
03/31/2022, 3:44:10 PM EST - System Generated
EE/IB

Key Metrics and Attributes

LEI Score Breakdown



Attributes



Comment



Ease comment

[See previous comment](#)

Overall Comments

[Do you really want to call me?](#) [See first comment](#)

Reason for Scores

I went to the Williston VT TD Bank to close my account and close out my safety deposit box. The people at the branch were wonderful and very helpful from the lady at the door to the branch manager. My issue is with the corporate decisions that forced me to move from the closed branch in Richmond VT to Williston. I needed a safe deposit box but had to wait because there were none ready when they closed Richmond (poor planning). Then I had to pay more for a box. Then make reservations to use the box. The excuse was there was no employees BUT TD let the Richmond people go instead of moving them to Williston. My deposit box payment was always taken out of my savings in the past but now? Nope I get a letter telling me I was overdue. I do not do overdue. When I asked I was told that it could not be set up for that direct pay anymore "policy" and I was now getting charged \$5.00 a month for the privilege of having a savings account with TD. And to top it off The Richmond Building sits empty in Richmond because TD will not sell to anyone in the banking world. Really?? Who wants a building with a giant vault in the middle of it? So now my town has vacant building in the middle of the business district thanks to TD. And when whomever is in charge of the building saw people using the parking lot and they went to the town to get permission to put Jersey barricades across the driveways to keep people out. IN THE MIDDLE OF THE BUSINESS DISTRICT. Thankfully the town told them no. So TD Bank has turned itself from "The most convenient Bank" to an eyesore that seems to have lost and type of understanding of community or customer relations. Most people and business I know of in my town have dropped TD over these reasons. Was my experience "exceptional" Why Yes, Yes it was, but not in a good way.

Operating metrics and additional client information

Operating metrics

Immediate acknowledgement/welcomed

Yes No

Previous touchpoints used

None

Yes No

Previous calls

Yes No

Previous branch visit / interaction

Yes No

Website

Yes No

Mobile app

Yes No

Online banking

Yes No

Other: specify

Yes No

Additional information

Recent store interaction

In person inside the store In person at the drive-up service I did not have an interaction with a store representative

Privacy opt-ins

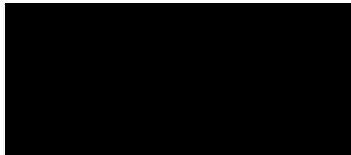
Privacy opt-in

Yes No



America's Most Convenient Bank[®]

April 1, 2022



Dear [REDACTED]

Thank you for your recent communication regarding the consolidation of our Store located at Richmond. We appreciate the time you've taken to express concern with our decision to close this location. At TD Bank, we strive to consistently deliver legendary Customer experiences. In this instance, we fell short of your expectations.

We know that these types of changes are never easy but want to reassure you that the team of banking professionals at your new bank location is committed to delivering the same legendary Customer experiences that you have come to expect from TD Bank.

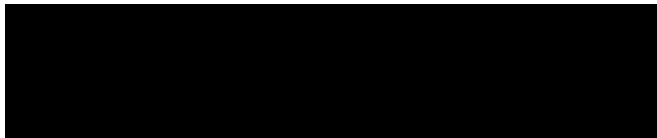
We truly value your relationship and have some convenient alternatives for you to consider, enabling you to bank at your convenience:

- Our new and improved Online Banking Site (TD Bank.com)
- Enhanced mobile banking and remote deposit capture services
- Our friendly Contact Center Team available 24 hours/day 7 days/week [REDACTED]
- And, a vast network of ATMs

While electronic banking services can't replace familiar, smiling faces, we believe these options can complement your personal visits to TD Bank and would be happy to discuss them further at your convenience.

We want to make this transition as easy as possible for you. If you have any questions, please don't hesitate to call us at [REDACTED]

Sincerely,



RMM Vermont

F-2
L-3
P-3
L-3
P-3

TDB: Customer Follow-up Request: Low score - goes to next state in 36 hours NEW



April 3, 2022, 9:30 AM EST

Respond ▾
Assign Alert
Close Alert
Add Note

Profile

Alert Type	Response Date
Alert Reopened	Creation Date
Survey Program	Transaction entry date
Sub Program	TDB Customer type
Survey Type	Customer full name
Team/Unit	Email name
Employee ID	Customer phone number
TDB: Region	Customer email
Regional Operations Officer	Survey Language
Market	Survey Status
Retail Market President	Included in LEI Score
Metro Market	
Shop/BM Start Date	
Survey ID	

Actions Taken

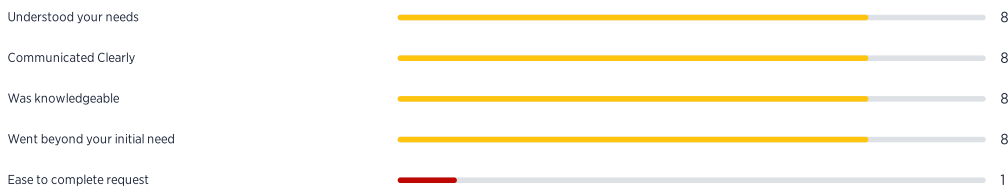
-  **Alert status set to New**
04/03/2022, 9:31:11 AM EST - System Generated
-  **Alert Created: TDB: Customer Follow-up Request: Low score**
04/03/2022, 9:31:03 AM EST - System Generated
EE/IB

Key Metrics and Attributes


LEI Score Breakdown



Attributes



Comment

 Ease comment
You close the branch on mule rd

Overall Comments

Since you closed the mile rd branch in Toms River I pass at least 9 other banks to get to Manchester branch. This is not convenient or safe. Most people living near me are senior citizens. They should not have to driver 10 miles round trip to go to the bank. Some should not be driving at all. The mule road branch was always busy. I don't I stand why it was closed. I have been a TD customer a long time. I do not like using debit cards. When there is a mistake very hard to get it right. In person I can check my transaction right there and have in straightened out with no problem.

Reason for Scores

Close the branch on mule rd toms river

Operating metrics and additional client information

Operating metrics

Immediate acknowledgement/welcome Yes No

Previous touchpoints used

None Yes No

Previous calls Yes No

Previous branch visit / interaction Yes No

Website Yes No

Mobile app Yes No

Online banking Yes No

Other: specify Yes No

Additional information

Recent store interaction In person inside the store In person at the drive-up service I did not have an interaction with a store representative

Privacy opt-ins

Privacy opt-in Yes No

From: [REDACTED]
To: [REDACTED]
Cc: [REDACTED]
Subject: RE: [REDACTED] -SLA 4/7
Date: Thursday, April 7, 2022 8:57:12 AM
Attachments: [Optimization Letter -- \[REDACTED\].docx](#)

Good morning,

[REDACTED], Manchester SM, spoke to the customer on 4/6 at 2:45 PM. He wanted to reinforce that the employees are terrific and nobody did anything wrong. He was expecting a call from corporate, but [REDACTED] told him she had experience as a regional manager, so he listened. His major complaint is the closing of the Mule Rd Store. He said there is a problem with bank policy. Mule Rd was extremely convenient and we closed it for big business \$\$\$\$\$. He doesn't go to Hooper Avenue location, along with most of the seniors in Holiday City because of the traffic. He mentioned how it's 10 miles round trip and most of those seniors shouldn't even be driving. He said all those seniors have to pass 5-8 banks on the way to us and he does NOT like the ATM machines. Doesn't care that we have an ATM on Mule Road. [REDACTED] did explain how our Reg E process works in the event of an issue and how we have our 888# available 24/7. He said Mule Rd looks like it's sold and he may see if another bank moves in there and will use another bank. He closed 2 accounts with us and knows many other seniors that already closed their account because Manchester is too far. He reinforced bank policy being ridiculous. [REDACTED] gave him her contact info in the event he changes his mind. They ended the call on good terms and an open door.

Attached is the optimization letter also.

[REDACTED]
Executive Assistant II
Monmouth/Middlesex & Ocean Regions
TD Bank, America's Most Convenient Bank
[REDACTED]
[REDACTED]

Internal

From: [REDACTED]
Sent: Monday, April 4, 2022 11:59 AM
To: [REDACTED]
Cc: [REDACTED]
[REDACTED]
[REDACTED]
Subject: [REDACTED] SLA 4/7

Good Morning,

Please see the attached LEI.

I have also attached an optimization letter that will need to be sent to the customer even if contact has been made.

SLA 4/7

Thank you.

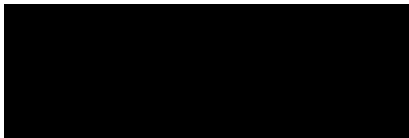


Customer Experience Officer II - Chairman's Services
Chairman's Service Center | Office of the President and CEO
TD Bank, America's Most Convenient Bank

Internal



April 7, 2022



Dear [REDACTED],

Thank you for your recent communication regarding the consolidation of our Store located at Mule Road. We appreciate the time you've taken to express concern with our decision to close this location. At TD Bank, we strive to consistently deliver legendary Customer experiences. In this instance, we fell short of your expectations.

We know that these types of changes are never easy but want to reassure you that the team of banking professionals at your new bank location is committed to delivering the same legendary Customer experiences that you have come to expect from TD Bank.

We truly value your relationship and have some convenient alternatives for you to consider, enabling you to bank at your convenience:

- Our new and improved Online Banking Site (TDBank.com)
- Enhanced mobile banking and remote deposit capture services
- Our friendly Contact Center Team available 24 hours/day 7 days/week [REDACTED]
- And, a vast network of ATMs

While electronic banking services can't replace familiar, smiling faces, we believe these options can complement your personal visits to TD Bank and would be happy to discuss them further at your convenience.

We want to make this transition as easy as possible for you. If you have any questions, please call us at [REDACTED].

[REDACTED]
Vice President, Retail Market Manager
[REDACTED]



[Redacted]

April 23, 2022, 9:08 AM EST

Respond [dropdown] Assign Alert Close Alert Add Note

Profile

Alert Type	[Redacted]
Alert Reopened	[Redacted]
Survey Program	[Redacted]
Sub Program	[Redacted]
Survey Type	[Redacted]
Team/Unit	[Redacted]
Employee ID	[Redacted]
Multi-Location	[Redacted]
TDB: Region	[Redacted]
Regional Operations Officer	[Redacted]
Market	[Redacted]
Retail Market President	[Redacted]
Metro Market	[Redacted]
Shop/BM Start Date	[Redacted]
Survey ID	[Redacted]

Response Date	04/23/2022, 09:08 AM
Creation Date	[Redacted]
Transaction entry date	[Redacted]
TDB Customer type	[Redacted]
Customer full name	[Redacted]
Email name	[Redacted]
Customer phone number	[Redacted]
Customer email	[Redacted]
Survey Language	[Redacted]
Survey Status	[Redacted]
Included in LEI Score	[Redacted]

Actions Taken

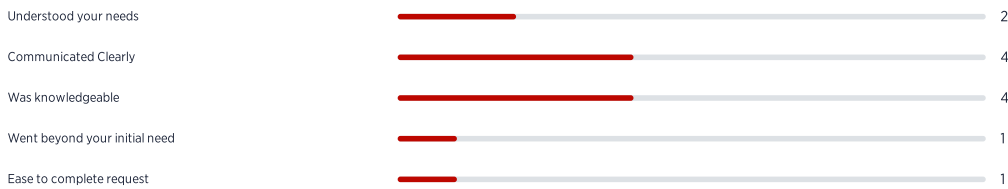
- Alert status set to New**
04/23/2022, 9:09:31 AM EST · System Generated
- Alert Created: TDB: Customer Follow-up Request: Low score**
04/23/2022, 9:09:21 AM EST · System Generated
EE/IB

Key Metrics and Attributes

LEI Score Breakdown



Attributes



Comment



Ease comment

I need to do large deposits (large for me \$10,000plus) a few times a year. Your stupid limit on online deposits is a enormous inconvenience. I waste an hour and a half driving to Montpelier, while I used to go to my local branch. I am very dissatisfied.

Overall Comments

I am very dissatisfied with TD Bank. Closing your Waitsfield branch with its competentpleasant staff makes ahuge inconvenience for me. The limits on online deposits are also ahuge inconvenience. The petty policy of charging for paper statements is constantly irritating. The lack of availability of local customer service is infuriating.I am a TD stockholder with several thousand shares and have multiple accounts, usually running a balance of over \$80,000. I am a dissatisfied customer and aim to break with TD in the not too distant future.

Other text

Can't do the transaction online.

Reason for Scores

The teller was polite and service was fine. I resent needing to drive 35 miles each way to do my banking since you closed the Waitsfield branch. It isahuge inconvenience and I cannot recommend TD to any personal banking customer.

Operating metrics and additional client information

Operating metrics

Immediate acknowledgement/welcome

Yes No

Previous touchpoints used

None

Yes No

Previous calls

Yes No

Previous branch visit / interaction

Yes No

Website

Yes No

Mobile app

Yes No

Online banking

Yes No

Other: specify

Yes No

Other text

Can't do the transaction online.

Additional information

Recent store interaction

In person inside the store In person at the drive-up service I did not have an interaction with a store representative

Privacy opt-ins

Privacy opt-in

Yes No

TDB: Customer Follow-up Request: Low score

ESCALATED



[Redacted]

April 23, 2022, 9:08 AM EST

Respond

Assign Alert

Close Alert

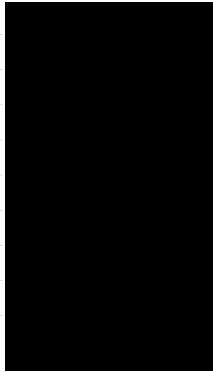
Add Note

Profile

Alert Type
Alert Reopened
Survey Program
Sub Program
Survey Type
Team/Unit
Employee ID
Multi-Location
TDB: Region
Regional Operations Officer
Market
Retail Market President
Metro Market
Shop/BM Start Date
Survey ID



Response Date 04/23/2022, 09:08 AM
Creation Date
Transaction entry date
TDB Customer type
Customer full name
Email name
Customer phone number
Customer email
Survey Language
Survey Status
Included in LEI Score



Actions Taken



Reply Sent: TDB - Unsuccessful Contact Attempt

05/03/2022, 3:26:32 PM EST

Dear [REDACTED]

We're committed to fulfilling your banking needs and delivering a legendary Customer experience. Today, I'm writing to let you know we received your feedback from our recent survey.

Thank you for speaking up.

We encourage our Customers to speak up and we're grateful that you did. Your feedback matters to us - and so do you. We know you have many choices when it comes to banking, and we're here to listen to you and help research and resolve your concerns.

Unfortunately, our attempts to connect via telephone have been unsuccessful.

Your trust and satisfaction are important to us.

If you have any questions please feel free to contact me at [REDACTED]. Thank you for the opportunity to continue serving your banking needs.

Sincerely,

[REDACTED]

TD Bank, America's Most Convenient Bank

[REDACTED]

Pronouns: She/Her/Hers



Reply Sent: TDB - Unsuccessful Contact Attempt

04/28/2022, 2:03:33 PM EST

Dear [REDACTED]

Thank you for your recent communication regarding the consolidation of our Store located at Waitsfield. We appreciate the time you've taken to express concern with our decision to close this location. At TD Bank, we strive to consistently deliver legendary Customer experiences. In this instance, we fell short of your expectations.

We know that these types of changes are never easy, but want to reassure you that the team of banking professionals at your new bank location is committed to delivering the same legendary Customer experiences that you have come to expect from TD Bank.

We truly value your relationship and have some convenient alternatives for you to consider, enabling you to bank at your convenience:

- Our new and improved Online Banking Site (TD Bank.com)

- Enhanced mobile banking and remote deposit capture services

- Our friendly Contact Center Team available 24 hours/day 7 days/week [REDACTED]

- And, a vast network of ATMs While electronic banking services can't replace familiar, smiling faces, we believe these options can complement your personal visits to TD Bank and would be happy to discuss them further at your convenience. We want to make this transition as easy as possible for you. If you have any questions, please don't hesitate to call us at [REDACTED]

[REDACTED]

Chairman's Customer Experience Officer

Chairman's Service Center



Alert Escalated

04/28/2022, 12:52:00 AM EST - System Generated

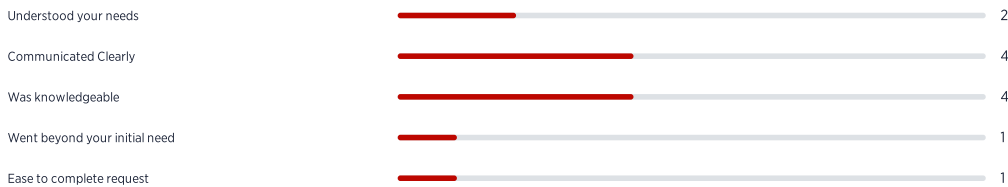
[View More](#) ▾

Key Metrics and Attributes

LEI Score Breakdown



Attributes



Comment



Ease comment

I need to do large deposits (large for me \$10,000plus) a few times a year. Your stupid limit on online deposits is a enormous inconvenience. I waste an hour and a half driving to Montpelier, while I used to go to my local branch. I am very dissatisfied.

Overall Comments

I am very dissatisfied with TD Bank. Closing your Waitsfield branch with its competentpleasant staff makes ahuge inconvenience for me. The limits on online deposits are also ahuge inconvenience. The petty policy of charging for paper statements is constantly irritating. The lack of availability of local customer service is infuriating.I am a TD stockholder with several thousand shares and have multiple accounts, usually running a balance of over \$80,000. I am a dissatisfied customer and aim to break with TD in the not too distant future.

Other text

Can't do the transaction online.

Reason for Scores

The teller was polite and service was fine. I resent needing to drive 35 miles each way to do my banking since you closed the Waitsfield branch. It isahuge inconvenience and I cannot recommend TD to any personal banking customer.

Operating metrics and additional client information

Operating metrics

Immediate acknowledgement/welcome

Yes No

Previous touchpoints used

None

Yes No

Previous calls

Yes No

Previous branch visit / interaction

Yes No

Website

Yes No

Mobile app

Yes No

Online banking

Yes No

Other: specify

Yes No

Other text

Can't do the transaction online.

Additional information

Recent store interaction

In person inside the store In person at the drive-up service I did not have an interaction with a store representative

Privacy opt-ins

Privacy opt-in

Yes No

Digital: Customer Follow-up Request: Low score - goes to next state in 36 hours NEW



[Redacted]

April 23, 2022, 7:46 PM EST

[Respond](#) [Close Alert](#) [Add Note](#)

Profile

Alert Type	[Redacted]
Alert Reopened	[Redacted]
Survey Program	[Redacted]
Sub Program	[Redacted]
Survey Type	[Redacted]
Team/Unit	[Redacted]
Survey ID	[Redacted]

Response Date	04/23/2022, 07:46 PM
Creation Date	[Redacted]
Transaction entry date	[Redacted]
TDB Customer type	[Redacted]
Customer full name	[Redacted]
Email name	[Redacted]
Customer phone number	[Redacted]
Customer email	[Redacted]
Survey Language	[Redacted]
Survey Status	[Redacted]

Actions Taken

- Alert Created: Digital: Customer Follow-up Request: Low score**
04/23/2022, 7:47:25 PM EST - System Generated
EE/IB

Key Metrics and Attributes

LEI Score Breakdown



Attributes



Comment

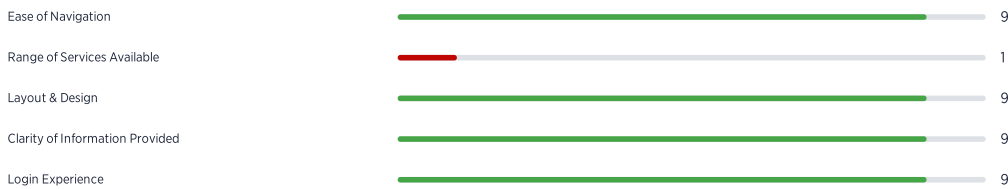
Ease comment
🗣️ Open my branch back up. 🗣️ Put an ATM near me. 🗣️ Closest bank is 25 miles from me.

Overall Comments
🗣️ Can't withdraw any cash from my bank.

Reason for Scores
🗣️ My bank closed, I can't get cash 🗣️ except a limited amount at Walmart nor talk to someone about any banking problems I have, like no convenience here.

Operating metrics and additional client information

Factors Responses

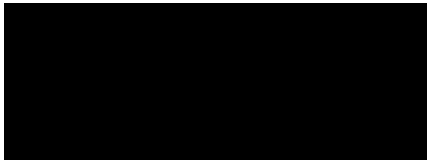


Privacy opt-ins

Privacy opt-in Yes No



April 28, 2022



Dear [REDACTED]

Thank you for your recent communication regarding the consolidation of our Store located at Starke. We appreciate the time you've taken to express concern with our decision to close this location. At TD Bank, we strive to consistently deliver legendary Customer experiences. In this instance, we fell short of your expectations.

We know that these types of changes are never easy, but want to reassure you that the team of banking professionals at your new bank location is committed to delivering the same legendary Customer experiences that you have come to expect from TD Bank.

We truly value your relationship and have some convenient alternatives for you to consider, enabling you to bank at your convenience:

- Our new and improved Online Banking Site (TD Bank.com)
- Enhanced mobile banking and remote deposit capture services
- Our friendly Contact Center Team available 24 hours/day 7 days/week [REDACTED]
- And, a vast network of ATMs

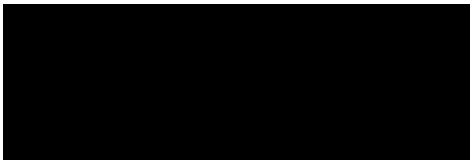
While electronic banking services can't replace familiar, smiling faces, we believe these options can complement your personal visits to TD Bank and would be happy to discuss them further at your convenience.

We want to make this transition as easy as possible for you. If you have any questions, please don't hesitate to call us at [REDACTED]

Sincerely,



April 28, 2022

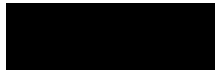


Dear [REDACTED],

You matter to us. Getting things right and providing you a legendary Customer experience is a top priority for us.

Our attempts to reach you by phone to discuss the survey have been unsuccessful. Please feel free to reach out to me at [REDACTED], if you would like to discuss the survey further.

Sincerely,



Store Manager

Digital: Customer Follow-up Request: Low score - goes to next state in 91 hours

NEW



[Redacted]

May 12, 2022, 9:17 AM EST

Respond Close Alert Add Note

Profile

Alert Type	[Redacted]	Response Date	05/12/2022, 09:17 AM
Alert Reopened	[Redacted]	Creation Date	[Redacted]
Survey Program	[Redacted]	Transaction entry date	[Redacted]
Sub Program	[Redacted]	TDB Customer type	[Redacted]
Survey Type	[Redacted]	Customer full name	[Redacted]
Team/Unit	[Redacted]	Email name	[Redacted]
Survey ID	[Redacted]	Customer phone number	[Redacted]
		Customer email	[Redacted]
		Survey Language	[Redacted]
		Survey Status	[Redacted]

Actions Taken

- Alert Created: Digital: Customer Follow-up Request: Low score
05/12/2022, 9:17:47 AM EST - System Generated
EE/IB

Key Metrics and Attributes

LEI Score Breakdown



Attributes



Comment

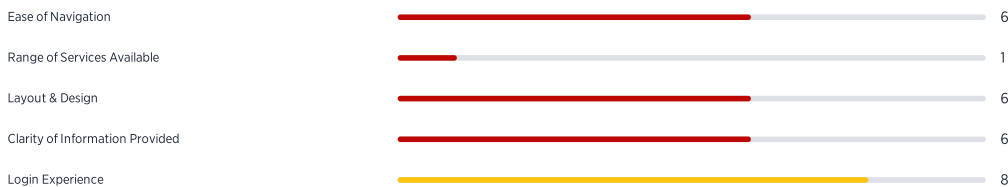
Overall Comments
Put an ATM in Macclenny, FL

Reason for Scores

You closed our TD bank in Macclenny, FL and now we don't even have an ATM. If I use an alternate ATM it costs me \$3 at the ATM and TD charges me \$3. That is \$6 to get \$200 from an ATM. You should at least give us an ATM. I am going to change banks unless something is done.

Operating metrics and additional client information

Factors Responses



Privacy opt-ins

Privacy opt-in Yes No

From: [REDACTED]
To: [REDACTED]
Subject: LEI Survey Concerns
Date: Thursday, May 12, 2022 5:13:03 PM

Dear [REDACTED]

Thank you for your recent communication regarding the consolidation of our Store located at Macclenny . We appreciate the time you've taken to express concern with our decision to close this location. At TD Bank, we strive to consistently deliver legendary Customer experiences. In this instance, we fell short of your expectations.

We know that these types of changes are never easy, but want to reassure you that the team of banking professionals at your new bank location is committed to delivering the same legendary Customer experiences that you have come to expect from TD Bank.

We truly value your relationship and have some convenient alternatives for you to consider, enabling you to bank at your convenience:

- Our new and improved Online Banking Site (TD Bank.com)
- Enhanced mobile banking and remote deposit capture services
- Our friendly Contact Center Team available 24 hours/day 7 days/week [REDACTED]
- And, a vast network of ATMs While electronic banking services can't replace familiar, smiling faces, we believe these options can complement your personal visits to TD Bank and would be happy to discuss them further at your convenience. We want to make this transition as easy as possible for you. If you have any questions, please don't hesitate to call us at [REDACTED]

Sincerely,

[REDACTED] Chairman's Customer Experience Officer
Chairman's Services Center, Office of the President CEO

TD Bank, America's Most Convenient Bank

 Please consider the environment before printing this email.

Internal

Digital: Customer Follow-up Request: Low score - goes to next state in 93 hours NEW



[Redacted]

July 8, 2022, 7:52 AM EST

Respond Close Alert Add Note

Profile

Alert Type	[Redacted]	Response Date	07/08/2022, 07:52 AM
Alert Reopened	[Redacted]	Creation Date	[Redacted]
Survey Program	[Redacted]	Transaction entry date	[Redacted]
Sub Program	[Redacted]	TDB Customer type	[Redacted]
Survey Type	[Redacted]	Customer full name	[Redacted]
Team/Unit	[Redacted]	Email name	[Redacted]
Survey ID	[Redacted]	Customer phone number	[Redacted]
		Customer email	[Redacted]
		Survey Language	[Redacted]
		Survey Status	[Redacted]

Actions Taken

- Alert Created: Digital: Customer Follow-up Request: Low score**
07/08/2022, 7:53:25 AM EST - System Generated
EE/IB

Key Metrics and Attributes

LEI Score Breakdown



Attributes

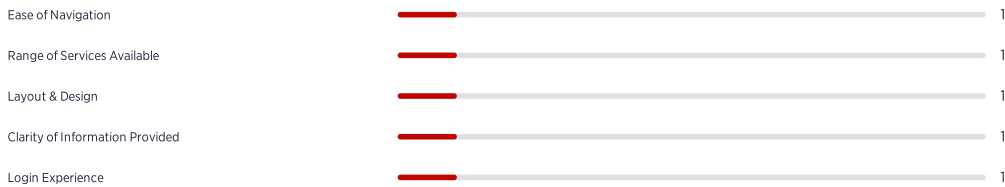


Comment

- Ease comment**
 you closed my branch and I don't feel save using the ATM at the next closest branch
- Reason for Scores**
 you closed my branch

Operating metrics and additional client information

Factors Responses

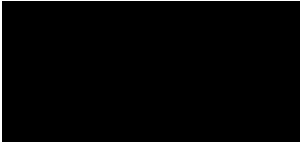


Privacy opt-ins

Privacy opt-in Yes No



July 15, 2022



Dear [REDACTED]

We received your recent feedback. Please know that your voice matters to us. Providing you a legendary Customer experience is a top priority for all of us at TD. Please know we're here to address your concerns.

Unfortunately, our attempts to reach you have been unsuccessful. Please call me at your earliest convenience so I can learn more about your issue and discuss how we can help. You can reach me at [REDACTED]

Thank you for the opportunity to work toward a solution together and further serve your banking needs.

Sincerely,



[REDACTED]
VP/Retail Market Manager Southern



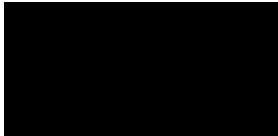
TD Bank, America's Most Convenient Bank®



Member FDIC TD Bank, N.A.



7/19/2022



Dear [REDACTED],

Thank you for your recent communication regarding the consolidation of our Store. We appreciate the time you've taken to express concern with our decision to close this location. At TD Bank, we strive to consistently deliver legendary Customer experiences. In this instance, we fell short of your expectations.

We know that these types of changes are never easy but want to reassure you, that the team of banking professionals at your new bank location is committed to delivering the same legendary Customer experiences that you have come to expect from TD Bank.

We truly value your relationship and have some convenient alternatives for you to consider, enabling you to bank at your convenience:

- Our new and improved Online Banking Site (TD Bank.com)
- Enhanced mobile banking and remote deposit capture services
- Our friendly Contact Center Team available 24 hours/day 7 days/week [REDACTED]
- And a vast network of ATMs

While electronic banking services can't replace familiar, smiling faces, we believe these options can complement your personal visits to TD Bank and would be happy to discuss them further at your convenience.

We want to make this transition as easy as possible for you. If you have any questions, please don't hesitate to call us at [REDACTED]

Sincerely,

Chairman's Service Center
Office of the President and CEO
TD Bank, America's Most Convenient Bank

TDB: Customer Follow-up Request: Low score - goes to next state in 37 hours NEW



[Redacted]

July 16, 2022, 3:35 PM EST

Respond [dropdown] Assign Alert Close Alert Add Note

Profile

Alert Type	[Redacted]
Alert Reopened	[Redacted]
Survey Program	[Redacted]
Sub Program	[Redacted]
Survey Type	[Redacted]
Team/Unit	[Redacted]
Employee ID	[Redacted]
TDB: Region	[Redacted]
Regional Operations Officer	[Redacted]
Market	[Redacted]
Retail Market President	[Redacted]
Metro Market	[Redacted]
Shop/BM Start Date	[Redacted]
Survey ID	[Redacted]

Response Date	07/16/2022, 03:35 PM
Creation Date	[Redacted]
Transaction entry date	[Redacted]
TDB Customer type	[Redacted]
Customer full name	[Redacted]
Email name	[Redacted]
Customer phone number	[Redacted]
Customer email	[Redacted]
Survey Language	[Redacted]
Survey Status	[Redacted]
Included in LEI Score	[Redacted]

Actions Taken

- Alert status set to New
07/16/2022, 3:35:44 PM EST - System Generated
- Alert Created: TDB: Customer Follow-up Request: Low score
07/16/2022, 3:35:39 PM EST - System Generated
EE/IB

Key Metrics and Attributes

LEI Score Breakdown



Attributes



Comment

Ease comment

I closed the account after 20 years because you closed your branch in the center of town close to all the shopping areas. I transferred \$45,000 out of my account. My wife inherited \$280,000 about the same time and transferred it into a separate entity because you closed the branch livery as she was notified of funds. I know quite a number of people who closer accounts with you because of this shortsighted decision. Please please bring this to the attention of your CEO. Hingham is an affluent town and does not appreciate ATM banking alone or having to travel to Quincy to do in person banking.

Overall Comments

You should review the value of lost accounts and Many accounts closed due to this inane decision.

Show this survey & comments to your CEO. Ask him to give me a call after he talks to the executive who made this decision. This is one of the worst business decisions I have seen. I dont want anyone phoning me but the CEO.

Reason for Scores

I cancelled my account after 20 years. You closer the store/branch on Lincoln Ave. Hingham MA

Operating metrics and additional client information

Operating metrics

Immediate acknowledgement/welcome Yes No

Previous touchpoints used

None Yes No

Previous calls Yes No

Previous branch visit / interaction Yes No

Website Yes No

Mobile app Yes No

Online banking Yes No

Other: specify Yes No

Additional information

Recent store interaction In person inside the store In person at the drive-up service I did not have an interaction with a store representative

Privacy opt-ins

Privacy opt-in Yes No



July 21, 2022



Dear [REDACTED]

Thank you for your recent communication regarding the consolidation of our Store located at 421 Lincoln St in Hingham. We appreciate the time you've taken to express concern with our decision to close this location. At TD Bank, we strive to consistently deliver legendary Customer experiences. In this instance, we fell short of your expectations.

We know that these types of changes are never easy but want to reassure you that the team of banking professionals at your new bank location is committed to the same legendary Customer experiences and choices that you have come to expect from TD Bank.

We truly value your relationship and have some convenient alternatives for you to consider:

- Our new and improved Online Banking Site (TD Bank.com)
- Enhanced mobile banking and remote deposit capture services
- Our friendly Contact Center Team available 24/7 [REDACTED]

While electronic banking services can't replace familiar, smiling faces, we believe these options can complement your personal visits to TD Bank. We'd be happy to discuss them further at your convenience.

The local team is ready and here for you! Please feel free to reach out so that we can personalize solutions regarding your banking needs at [REDACTED]

Sincerely,

[REDACTED] | Chairman's Customer Experience Officer

Office of the President and CEO



TDB: Customer Follow-up Request: Low score - goes to next state in 37 hours NEW



[Redacted]

July 24, 2022, 4:07 PM EST

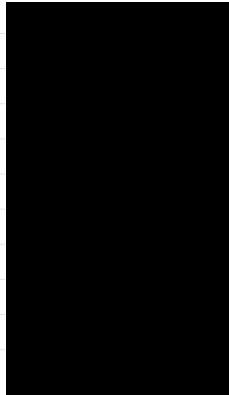
Respond | Assign Alert | Close Alert | Add Note

Profile

- Alert Type
- Alert Reopened
- Survey Program
- Sub Program
- Survey Type
- Team/Unit
- TDB: Region
- Regional Operations Officer
- Market
- Retail Market President
- Metro Market
- Shop/BM Start Date
- Survey ID



- Response Date: 07/24/2022, 04:07 PM
- Creation Date
- Transaction entry date
- TDB Customer type
- Customer full name
- Email name
- Customer phone number
- Customer email
- Survey Language
- TDB Survey Type
- Survey Status
- Included in LEI Score

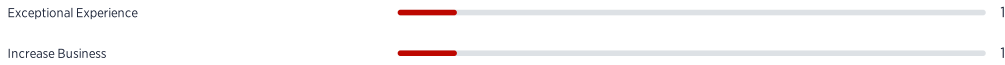


Actions Taken

- Alert status set to New**
07/24/2022, 4:07:47 PM EST · System Generated
- Alert Created: TDB: Customer Follow-up Request: Low score**
07/24/2022, 4:07:41 PM EST · System Generated
EE/IB

Key Metrics and Attributes

LEI Score Breakdown



Attributes



Comment

Ease comment
🗨️ Open up some new branches.

Other text
📞 phone call

Reason for Scores
🗨️ You keep shutting branched in the Poughkeepsie NY area.

Operating metrics and additional client information

Operating metrics

Immediate acknowledgement/welcome Yes No

Previous touchpoints used

None Yes No

Previous calls Yes No

Previous branch visit / interaction Yes No

Website Yes No

Mobile app Yes No

Online banking Yes No

Other: specify Yes No

Other text
phone call

Additional information

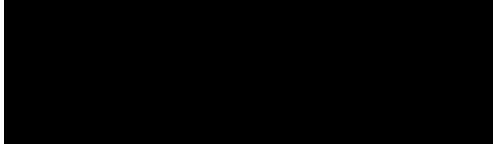
Recent store interaction In person inside the store In person at the drive-up service I did not have an interaction with a store representative

Privacy opt-ins

Privacy opt-in Yes No



August 1, 2022



Dear [REDACTED]

You matter to us. Getting things right and providing you a legendary Customer experience is a top priority for us. Today, we're writing to let you know that our leadership team shared your feedback.

We heard your concerns and appreciate the opportunity to find a resolution.

Thank you for speaking up. Your feedback makes us better, and we want to be the best for you. We're grateful for your business, and we're here to address your concerns.

Unfortunately, our attempts to reach you have been unsuccessful. Please call me at your earliest convenience so I can learn more about your issue and discuss how we can help. You can reach me at [REDACTED]. Thank you for the opportunity to work toward a solution together and further serve your banking needs.

Sincerely,



Retail Market Manager
North Region

From: [REDACTED]
To: [REDACTED]
Subject: Your TD Bank Survey
Date: Monday, August 1, 2022 1:37:43 PM

Dear [REDACTED],

Thank you for your recent communication regarding the consolidation of our Store located at Poughkeepsie. We appreciate the time you've taken to express concern with our decision to close this location. At TD Bank, we strive to consistently deliver legendary Customer experiences. In this instance, we fell short of your expectations. We know that these types of changes are never easy, but want to reassure you that the team of banking professionals at your new bank location is committed to delivering the same legendary Customer experiences that you have come to expect from TD Bank.

We truly value your relationship and have some convenient alternatives for you to consider, enabling you to bank at your convenience:

- Our new and improved Online Banking Site (TD Bank.com)
- Enhanced mobile banking and remote deposit capture services
- Our friendly Contact Center Team available 24 hours/day 7 days/week [REDACTED]
- And, a vast network of ATMs

While electronic banking services can't replace familiar, smiling faces, we believe these options can complement your personal visits to TD Bank and would be happy to discuss them further at your convenience.

We want to make this transition as easy as possible for you. If you have any questions, please don't hesitate to call us at [REDACTED]

Sincerely,

Chairman's Service Center
Office of the President and CEO
TD Bank, America's Most Convenient Bank®

Internal



[Redacted]

August 16, 2022, 3:31 PM EST

Respond [dropdown] Assign Alert Close Alert Add Note

Profile

Alert Type	[Redacted]
Alert Reopened	[Redacted]
Survey Program	[Redacted]
Sub Program	[Redacted]
Survey Type	[Redacted]
Team/Unit	[Redacted]
Employee ID	[Redacted]
TDB: Region	[Redacted]
Regional Operations Officer	[Redacted]
Market	[Redacted]
Retail Market President	[Redacted]
Metro Market	[Redacted]
Shop/BM Start Date	[Redacted]
Survey ID	[Redacted]

Response Date	08/16/2022, 03:31 PM
Creation Date	[Redacted]
Transaction entry date	[Redacted]
TDB Customer type	[Redacted]
Customer full name	[Redacted]
Email name	[Redacted]
Customer phone number	[Redacted]
Customer email	[Redacted]
Survey Language	[Redacted]
Survey Status	[Redacted]
Included in LEI Score	[Redacted]

Actions Taken

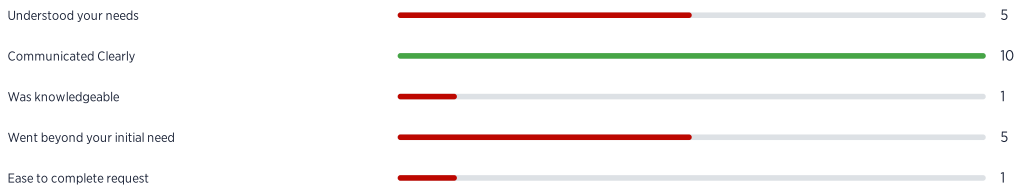
- Alert status set to New**
08/16/2022, 3:32:26 PM EST - System Generated
- Alert Created: TDB: Customer Follow-up Request: Low score**
08/16/2022, 3:32:19 PM EST - System Generated
EE/IB

Key Metrics and Attributes

LEI Score Breakdown



Attributes



Comment

Ease comment
 see last statement

Overall Comments
 see my first statement

Reason for Scores
 When you closed the Garden St., Titusville branch you said you would be putting an ATM in north Titusville. That has not happened. I had the additional insult with the teller wanting me to recommend TD Bank to friends and family.

Operating metrics and additional client information

Operating metrics

Immediate acknowledgement/welcome Yes No

Previous touchpoints used

None Yes No

Previous calls Yes No

Previous branch visit / interaction Yes No

Website Yes No

Mobile app Yes No

Online banking Yes No

Other: specify Yes No

Additional information

Recent store interaction In person inside the store In person at the drive-up service I did not have an interaction with a store representative

Privacy opt-ins

Privacy opt-in Yes No

[REDACTED]

From: [REDACTED]
Sent: Tuesday, February 7, 2023 7:43 AM
To: [REDACTED]
Subject: RE: [REDACTED]

Hi [REDACTED]

Here is the response. The SM called the customer on 8/18/2022.

Monica spoke to [REDACTED] this morning. I reiterated his alternative banking options and if I can help him in any way. He said he always has been satisfied with TD Bank and our service. I let him know his comments and concerns were heard and explained that this ATM maybe a potential in the future. He did say, "He would let us know every chance he got about no ATM." I did let him know that we would provide legendary service when he came in to visit us and the surveys were based on the employee that served him during that transaction. He asked me to change his scores which I explained I couldn't. Overall it was a good conversation he seemed to understand when I explained in depth and said he would do his banking when he comes this way for other errands.

[REDACTED]

Customer Experience Officer II - Chairman's Services
Chairman's Service Center | Office of the President and CEO

TD Bank, America's Most Convenient Bank





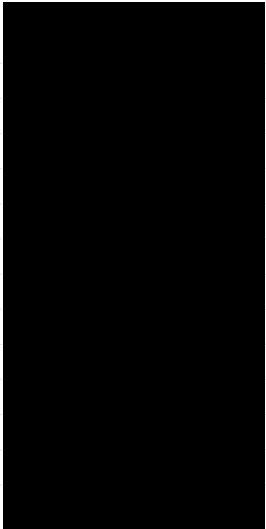
[Redacted]

September 2, 2022, 10:19 AM EST

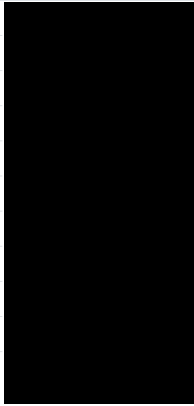
Respond Close Alert Add Note

Profile

- Alert Type
- Alert Reopened
- Survey Program
- Sub Program
- Survey Type
- Team/Unit
- Employee ID
- TDB: Region
- Regional Operations Officer
- Market
- Retail Market President
- Metro Market
- Shop/BM Start Date
- Survey ID



- Response Date 09/02/2022, 10:19 AM
- Creation Date
- Transaction entry date
- TDB Customer type
- Customer full name
- Email name
- Customer phone number
- Customer email
- Survey Language
- TDB Survey Type
- Survey Status
- Included in LEI Score



Actions Taken

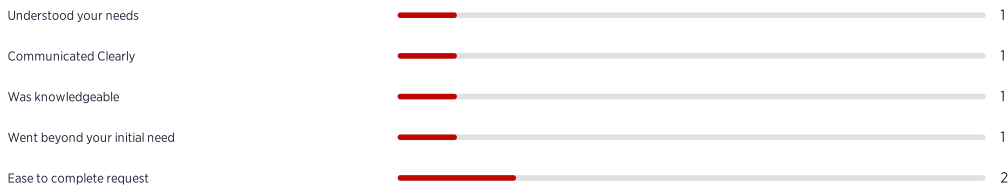
- Alert status set to New**
09/02/2022, 11:30:12 PM EST · System Generated
- Alert Created: Low EE/IB (No Store Visit)**
09/02/2022, 11:30:04 PM EST · System Generated
Low EE/IB (No Store Visit)

Key Metrics and Attributes

LEI Score Breakdown



Attributes



Comment

Ease comment
⚠ Reopen old bank and close smaller understaffed bank.

Reason for Scores

⚠ You closed our nearby bank which was our reason for joining you. ⚠ the next nearby bank in Manchester New Jersey is understaffed and small and difficult to get into. ⚠ I have moved my automatic SS. ⚠ payment out of your bank and I am actively looking for a more convenient bank to move my automatic pension check to. ⚠ WE're always put on hold when we call your number. ⚠ You are not convenient at all. ✅ The "exceptional" applies to how quickly you reversed the trend from "service" to "dilemma".

Operating metrics and additional client information

Additional information

Recent store interaction

In person inside the store

In person at the drive-up service

I did not have an interaction with a store representative

Privacy opt-ins

Privacy opt-in

Yes

No



America's Most Convenient Bank®

September 8, 2022



Dear [REDACTED]

Thank you for your recent communication regarding the consolidation of our Store located at Mule Road. We appreciate the time you've taken to express concern with our decision to close this location. At TD Bank, we strive to consistently deliver legendary Customer experiences. In this instance, we fell short of your expectations.

We know that these types of changes are never easy but want to reassure you that the team of banking professionals at your new bank location is committed to the same legendary Customer experiences and choices that you have come to expect from TD Bank.

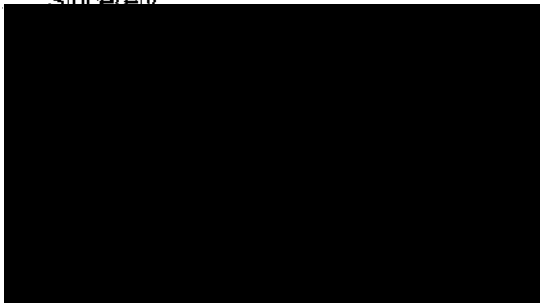
We truly value your relationship and have some convenient alternatives for you to consider:

- Our new and improved Online Banking Site (TD Bank.com)
- Enhanced mobile banking and remote deposit capture services
- Our friendly Contact Center Team available 24/7 [REDACTED]

While electronic banking services can't replace familiar, smiling faces, we believe these options can complement your personal visits to TD Bank. We'd be happy to discuss them further at your convenience.

The local team is ready and here for you! Please feel free to reach out to either [REDACTED] Manchester Store Manager [REDACTED] so that we can personalize solutions regarding your banking needs.

Sincerely,



TDB: Customer Follow-up Request: Low score - goes to next state in 37 hours NEW



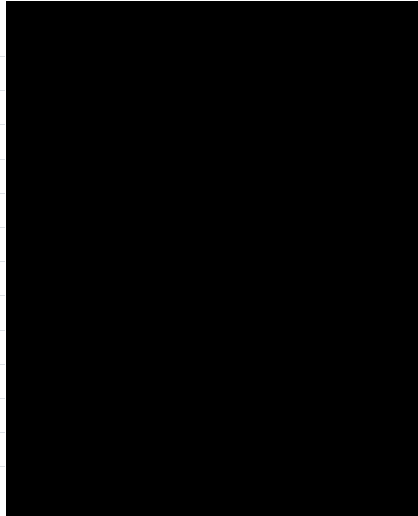
[Redacted]

October 1, 2022, 4:49 PM EST

Respond | Assign Alert | Close Alert | Add Note

Profile

- Alert Type
- Alert Reopened
- Survey Program
- Sub Program
- Survey Type
- Team/Unit
- Employee ID
- TDB: Region
- Regional Operations Officer
- Market
- Retail Market President
- Metro Market
- Shop/BM Start Date
- Survey ID



Response Date	10/01/2022, 04:49 PM
Creation Date	[Redacted]
Transaction entry date	[Redacted]
TDB Customer type	[Redacted]
Customer full name	[Redacted]
Email name	[Redacted]
Customer phone number	[Redacted]
Customer email	[Redacted]
Survey Language	[Redacted]
Survey Status	[Redacted]
Included in LEI Score	[Redacted]

Actions Taken

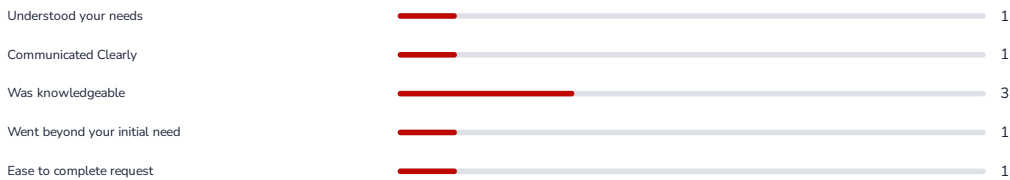
- Alert status set to New**
10/01/2022, 4:50:28 PM EST - System Generated
- Alert Created: TDB: Customer Follow-up Request: Low score**
10/01/2022, 4:50:09 PM EST - System Generated
EE/B

Key Metrics and Attributes

LEI Score Breakdown



Attributes



Comment

Other text
Was not allowed any other way

Reason for Scores
You keep closing my branch with a safe deposit box so I keep having to move my stuff and I don't live in the area full time anymore

Operating metrics and additional client information

Operating metrics

Immediate acknowledgement/welcome Yes No

Previous touchpoints used

None Yes No

Previous calls Yes No

Previous branch visit / interaction Yes No

Website Yes No

Mobile app Yes No

Online banking Yes No

Other: specify Yes No

Other text
Was not allowed any other way

Additional information

Recent store interaction In person inside the store In person at the drive-up service I did not have an interaction with a store representative

Privacy opt-ins

Privacy opt-in Yes No

From: [REDACTED]
To: [REDACTED]
Subject: Your TD Bank Survey
Date: Monday, October 3, 2022 2:30:53 PM

Dear [REDACTED]:

Thank you for your recent communication regarding the consolidation of our Store located at Claredon Wilson. We appreciate the time you've taken to express concern with our decision to relocate the store. At TD Bank, we strive to consistently deliver legendary Customer experiences. In this instance, we fell short of your expectations.

We know that these types of changes are never easy, but want to reassure you that the team of banking professionals at your bank location is committed to delivering the same legendary Customer experiences that you have come to expect from TD Bank. We truly value your relationship and have some convenient alternatives for you to consider, enabling you to bank at your convenience: -

Our new and improved Online Banking Site (TD Bank.com) –
Enhanced mobile banking and remote deposit capture services –
Our friendly Contact Center Team available 24 hours/day 7 days/week [REDACTED] –
And, a vast network of ATMs

While electronic banking services can't replace familiar, smiling faces, we believe these options can complement your personal visits to TD Bank and would be happy to discuss them further at your convenience. We want to make this transition as easy as possible for you. If you have any questions, please don't hesitate to call us at [REDACTED].

Sincerely,

Chairman's Service Center
[REDACTED]

Internal



[Redacted]

December 3, 2022, 2:59 PM EST

Respond Assign Alert Close Alert Add Note

Profile

Alert Type	[Redacted]
Alert Reopened	[Redacted]
Survey Program	[Redacted]
Sub Program	[Redacted]
Survey Type	[Redacted]
Team/Unit	[Redacted]
Employee ID	[Redacted]
TDB: Region	[Redacted]
Regional Operations Officer	[Redacted]
Market	[Redacted]
Retail Market President	[Redacted]
Metro Market	[Redacted]
Shop/BM Start Date	[Redacted]
Survey ID	[Redacted]

Response Date	12/03/2022, 02:59 PM
Creation Date	[Redacted]
Transaction entry date	[Redacted]
TDB Customer type	[Redacted]
Customer full name	[Redacted]
Email name	[Redacted]
Customer phone number	[Redacted]
Customer email	[Redacted]
Survey Language	[Redacted]
Survey Status	[Redacted]
Included in LEI Score	[Redacted]

Actions Taken

- Alert status set to New**
12/03/2022, 3:00:12 PM EST · System Generated
- Alert Created: TDB: Customer Follow-up Request: Low score**
12/03/2022, 2:59:53 PM EST · System Generated
EE/B

Key Metrics and Attributes

LEI Score Breakdown



Attributes



Operating metrics and additional client information

Operating metrics

Immediate acknowledgement/welcome Yes No

Previous touchpoints used

None Yes No

Previous calls Yes No

Previous branch visit / interaction Yes No

Website Yes No

Mobile app Yes No

Online banking Yes No

Other: specify Yes No


Additional information

Recent store interaction In person inside the store In person at the drive-up service I did not have an interaction with a store representative

Privacy opt-ins

Privacy opt-in Yes No

Comment

 Ease comment
 No local branch near

Overall Comments

I'm not happy with not having a branch local. To make deposits I have to drive at least a half hour to the nearest branch. Additionally, I'm charged transaction fees for using non TD ATM machines. I'm ready to go with a bank with better customer service.

Reason for Scores

There are no local branches close to my home. TD closed the two branches that were near or local to me. I'm considering changing banks because of this and I've been a customer for a long time

From: [REDACTED]
To: [REDACTED]
Subject: Your TD Bank Survey
Date: Monday, December 12, 2022 11:06:41 AM

Dear [REDACTED]

Thank you for your recent communication regarding the consolidation of our Store located at Auburndale. We appreciate the time you've taken to express concern with our decision to close this location. At TD Bank, we strive to consistently deliver legendary Customer experiences. In this instance, we fell short of your expectations.

We know that these types of changes are never easy, but want to reassure you that the team of banking professionals at your new bank location is committed to the same legendary Customer experiences and choices that you have come to expect from TD Bank.

We truly value your relationship and have some convenient alternatives for you to consider:

- Our new and improved Online Banking Site (TD Bank.com)
- Enhanced mobile banking and remote deposit capture services
- Our friendly Contact Center Team available 24/7 [REDACTED]

While electronic banking services can't replace familiar, smiling faces, we believe these options can complement your personal visits to TD Bank. We'd be happy to discuss them further at your convenience.

The local team is ready and here for you! Please feel free to reach out so that we can personalize solutions regarding your banking needs at [REDACTED]

Sincerely,

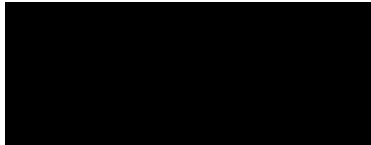
[REDACTED] Chairman's Customer Experience Officer
Office of the President and CEO

TD Bank, America's Most Convenient Bank®

Internal



December 12, 2022

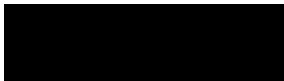


Dear [REDACTED],

You matter to us. Getting things right and providing you a legendary Customer experience is a top priority for us.

Our attempts to reach you by phone to discuss the survey been unsuccessful. Please feel free to reach out to me at [REDACTED] if you would like to discuss the survey further.

Sincerely,



Store Manager