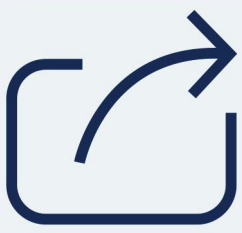
THE COMPLAINT PROCESS

01

Speak with Plannera staff

Plannera's Pension Administration staff will work with you to resolve any concerns. You may request to have the Plan Manager review your inquiry. The Plan Manager will determine the appropriate approach to address your concern.

02



Response from Plannera

If your inquiry is determined to be administrative, a written response will be provided by the Plan Manager. If you are unsatisfied with the response, or if Pension Administration finds an interpretation of the Act or regulations is required, you will be asked to submit a written complaint to the the PEPP Board.

03

Submit documentation

If you are asked to submit a written complaint, address it to the Director of Governance at Plannera, include all documentation. To remain neutral, the Director will assume the role of Executive Secretary to the Board. Email: complaints@plannera.ca

04

Investigation

The Executive Secretary will promptly inform the Board and begin an investigation. They will review all submissions and conduct any research required to provide the Board with the information needed to make an informed decision.

05

Report to the Board

The Executive Secretary will present a written report describing the complaint. The complainant may include a written response to the report. From these materials, the Board will decide whether to grant a hearing.

06

Hearing

If a hearing is granted, the complainant can request, in advance, to attend in person. The Board may request additional information prior to the hearing. If no hearing is granted the Board will proceed to a decision.

07

Final Decision

The Board will render a decision in writing, including the reason. A decision made by the Board is considered final unless new information becomes available.