

## TIMELINE OF EVENTS: TRISHA D. MCDONALD

**June 1, 2016:** Sandra Wright, Account Manager, Lloydminster Branch makes the following note regarding Ms. McDonald.

The screenshot shows the Synergy Credit Union interface for a relationship profile. The top navigation bar includes: Wizards, Maintenance, Quick Inquiries, Collateral, Agreements, Print, Calculators, My Forms, System, Logout. The profile header for TRISHA D. MCDONALD includes: Member # 131, SIN 942 325 872, Shared Account Number 28894447034, Phone # (306) 223-8381, Member Since 06-01-2007, and DOB 06-02-1972. The address is 303-411 47 AVE, LLOYDMINSTER, SK S9V 6T9, Canada. The relationship profile is titled "Relationship Profile - MCDONALD, T.". Below this is a "Notes" section with a table of notes:

Note Class	Sub Class	Created By	Created Date/Time	Note Text	Inactive Date
Note	DEFAULT	PATRICIA S. WA	06-07-2016 11:47:44 AM	June 7 16 - tried to call Trisha again today, still no answer	
Note	DEFAULT	PATRICIA S. WA	06-08-2016 05:28:00 PM	June 2 16 - called Trisha 4 times over the last 2 days if s	
Note	DEFAULT	SANDRA D. WRI	06-01-2016 03:00:17 PM	I received a Voice Mail from Tricia inquiring about her Mort...	
Note	DEFAULT	PATRICIA S. WA	08-12-2016 12:21:17 PM	Aug 10 16 - please do not offer a mortgage renewal if an	
Note	DEFAULT	SANDRA D. WRI	06-08-2016 10:45:07 AM	As Renewal Date July 23 2016, DO NOT allow any redact	

Below the table is an "Edit Note" form with fields for Note Class (set to Note), Sub Class (set to DEFAULT), and Inactive Date. The Note Text field contains: "received a Voice Mail from Tricia inquiring about her Mortgage Renewal. As per conversation last year with Patty Wang, I forwarded the voice mail to her. Patty replied and said she don't get an ans wen however, if Tricia is back to forward her to Patty."

At the bottom of the interface, there are buttons for "Create", "Edit", "Inactivate", and "Delete". The status bar at the very bottom shows "PRODUCTION", "22051", "06-16-2016", "None", "JASON V BAZINET", and "21358".

**June 2, 2016:** Synergy Credit Union has internal discussions to reach an agreed upon approach regarding Ms. McDonald's mortgage renewal.

-----Original Message-----

From: Brent Bergen

Sent: Thursday, June 02, 2016 8:51 AM

To: Patty Wang <Patty.Wang@synergycu.ca>; Christine Tucker <Christine.Tucker@synergycu.ca>; Jason Bazinet <Jason.Bazinet@synergycu.ca>; Glenn Stang <Glenn.Stang@synergycu.ca>

Subject: RE: Tricia McDonald

Good Morning

Trish's choice to continuously use defamation remarks towards Synergy has led us to a decision of freeing her up from her Synergy Relationship. All of her business will be available to move to a FI that will meet her needs. Synergy will make it easy and with no additional cost / penalties. Her mortgage is up for renewal in July. If we continue to believe this is in everyone's best interest, I would offer we take the high road and be truthful. Perhaps something along the lines of:

Synergy has not met your needs Trish, as evidenced by your continuous negative remarks towards Synergy Credit Union. We would like to make it as simple as possible for you to find a

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new financial institution that will meet your expectations. Synergy will make it easy by waiving all of our costs for you to move your business from us including your mortgage that is coming due in July. Understanding for you to make these arrangements will take some time, we would encourage you to begin the process ensuring all arrangements are in place to meet the expiry of your mortgage on July ????? when the mortgage is due in full.

We should expect some social media buzz when Trish learns of this.

-----Original Message-----

**From:** Glenn Stang

**Sent:** Thursday, June 02, 2016 8:54 AM

**To:** Brent Bergen <Brent.Bergen@synergycu.ca>; Patty Wang <Patty.Wang@synergycu.ca>; Christine Tucker <Christine.Tucker@synergycu.ca>; Jason Bazinet <Jason.Bazinet@synergycu.ca>

**Subject:** RE: Tricia McDonald

I continue to be very supportive of this action. She has been unresponsive to our request to meet as well.

-----Original Message-----

**From:** Christine Tucker

**Sent:** Thursday, June 2, 2016 9:12 AM

**To:** Glenn Stang; Brent Bergen; Patty Wang; Jason Bazinet

**Cc:** Gord Thiel

**Subject:** RE: Tricia McDonald

Hello,

Thanks for sharing our approach. I have also talked with Kelsey who had talked with Sandra yesterday and they too are supportive. I have included Gord in so that he too is aware.

Thanks Patty for bringing this forward.

Chris