# Daniel's Customer Service Account Service Referral Customer Accounts Write CLEARLY and LEGIBLY!

Date/Time of Day: _____

| Contact From ("Who's calling in?"): | **ALL ISSUES REPORTED ON THIS FORM MUST BE REPORTED BASED ON A REQUEST FROM THE CUSTOMER OR SOMEONE THE CUSTOMER HAS PREVIOUSLY AUTHORIZED TO SPEAK ON HIS/HER BEHALF** |
|---|---|
| Daniel's Customer (if different from Caller) | Customer Account Number (if no account, write "None"): |
| Cell Telephone: | Best Time to Call: <br> □ Preferred |
| Work Telephone: | Best Time to Call: <br> □ Preferred |
| Home Telephone | Best Time to Call: <br> □ Preferred |

## □ Customer is requesting that his/her account be closed

Be careful to *NOT* agree to or suggest that closing an account will result in the account being deleted from the credit bureaus

## □ Customer wants an account status letter

Verify the customer's address in MAGIX or attach address change form with corrections

□ Customer wants letter mailed to address on account

□ Customer want letter send to his/her email: _____

□ Customer authorized letter to be sent to a third party:

    □ Request and receive customer authorization to send letter to third party

    □ Send letter to: Name: _____

        FAX, Email Address, or mailed to: _____

        Voice Telephone (follow-up): _____

## □ Customer is disputing credit bureau report or states is victim of fraud

Please do *NOT* simply pass along simple/obvious questions or complaints. We do not delete credit bureau reports. We cannot make "goodwill" adjustments. If a customer is complaining that our trade line is wrong or should have been deleted due to age of report *OR* states that he/she is a victim of identity theft, please use this form to refer the matter to SMC Customer Service

## □ Customer wants a replacement credit card

□ Borrower      □ Co-borrower

Verify the customer's address in MAGIX or attach address change form with corrections

Completed By:

Name: _____ Date:_____ Telephone: _____

**Delivery or provide this completed form to SMC Customer Service (310) 665-2111**