



E D G E P O I N T

Accessible customer service

Our commitment

EdgePoint Wealth Management Inc. is committed to treating all people in a way that allows them to maintain their dignity and independence. We believe in integration and equal opportunity. We are committed to meeting the needs of people with disabilities in a timely manner and will do so by preventing and removing barriers to accessibility and meeting accessibility requirements under the *Accessibility for Ontarians with Disabilities Act (AODA)* and the *Integrated Accessibility Standards Regulations (IASR)*.

EdgePoint maintains a multi-year accessibility plan to help us meet our commitments under AODA and improve overall accessibility. The plan is updated at least every five years, is available in an accessible format upon request and is posted on our website.

Assistive devices

We will ensure that our staff are trained and familiar with various assistive devices that may be used by customers with disabilities while accessing our goods or services.

Communication

We will communicate with people with disabilities in ways that consider their disability.

Accessible formats and communication supports

Upon request, we will provide accessible formats and communication supports for EdgePoint information in a timely manner, considering the person's accessibility needs.

Service animals

We welcome people with disabilities and their service animals. Service animals are allowed on the parts of our premises that are open to the public.

Support persons

A person with a disability who is accompanied by a support person will be allowed to have that person accompany them on our premises. A support person will only be required by EdgePoint to accompany someone with a disability if for the purposes of health or safety and in consultation with the person and at no fee. EdgePoint will first consult with the person with a disability and will determine if there is no other way to protect the health and safety of that person.

Notice of temporary disruption

In the event of a planned or unexpected disruption to services or facilities for customers with disabilities, EdgePoint will notify customers promptly. This notice will include information about the reason for the disruption, its anticipated length of time, and a description of alternative facilities or services, if available.

The notice will be placed at all public entrances on our premises.



Training

EdgePoint provides training on AODA regulation and the Human Rights Code to all employees (including those involved in developing accessibility policies) when hired and when there is a change to procedures. Third-party representatives and volunteers who provide goods, services, and facilities on behalf of EdgePoint and interact directly with clients also receive training. Topics include:

- An overview of the AODA and the requirements of the customer service standard's plan
- How to interact and communicate with people with various types of disabilities
- How to interact with people with disabilities who use an assistive device or require the assistance of a service animal or a support person
- What to do if a person with a disability is having difficulty in accessing EdgePoint

Service partners

EdgePoint will ensure that any partners/vendors providing customer service on EdgePoint's behalf also have a policy and training program in place with respect to Providing Goods and Services to People with Disabilities.

Employment

EdgePoint is committed to fair and accessible employment practices and welcomes applications from people with disabilities. Accommodations are available upon request for candidates during recruitment and when hired.

Accommodation plans for employees with disabilities

EdgePoint will work together with any employee with a disability to ensure an accommodation plan is created and documented to meet their individual needs.

More information and feedback

Customers who wish to provide feedback on the way EdgePoint provides goods and services to people with disabilities or would like more information can email us at: info@edgepointwealth.com, contact us toll free at 1.866.757.7207 or by mail at:

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