



E D G E P O I N T

MULTI-YEAR ACCESSIBILITY PLAN FOR ONTARIANS WITH DISABILITIES

This accessibility plan outlines the policies and actions EdgePoint Wealth Management Inc. (“EdgePoint”) has implemented to improve opportunities for people with disabilities.

EdgePoint’s multi-year accessibility plan will be reviewed and updated at least once every five years.

Our commitment

EdgePoint 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, 2005 (AODA)* and the *Integrated Accessibility Standards Regulations (IASR)*.

Information and communications

EdgePoint is committed to meeting the communication needs of people with disabilities.

1. Feedback, accessible formats and communication supports

EdgePoint has a process for receiving and responding to feedback (including complaints) which is accessible to persons with disabilities. When accessible formats and communication supports for persons with disabilities are requested, EdgePoint:

- Provides accessible formats and communication supports in a timely manner that considers the individual's needs
- Consults with the person making the request to determine the suitability of an accessible format or communication support

EdgePoint has notified the public about the availability of accessible formats and communication supports.

2. Accessible websites and web content

EdgePoint:

- Has assessed its website to identify areas with accessibility issues
- Has made its website and content conform with Website Content Accessibility Guidelines 2.0, Level AA
- Has made its website more accessible by providing consistent video and image captioning, appropriate font sizes, and sufficient color contrast
- Ensures website content, to a reasonable extent, avoids long sentences of difficult financial terms for those with potential cognitive difficulties
- Is committed to following AODA accessibility guidelines for future website development

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.



1. Recruitment, assessment, and selection

EdgePoint supports persons with disabilities throughout its recruitment process by striving to ensure job descriptions are clear, specific, and skills based. EdgePoint will notify employees and the public that accommodations can be made for applicants with disabilities in the recruitment process. This includes:

- On its website and on job postings, EdgePoint will specify that an accommodation is available
- EdgePoint will review modify existing recruitment policies, procedures, and processes as necessary

EdgePoint will notify job applicants when they are selected to participate in an interview or assessment, that accommodation is available upon request in relation to the materials or processes to be used.

If a selected applicant requests an accommodation, EdgePoint will consult with the applicant and provide suitable accommodation considering the applicant's accessibility needs. When making offers of employment, EdgePoint will notify successful applicants of its policies for accommodating employees with disabilities.

2. Accessible formats and communication supports for employees

EdgePoint informs all employees of policies that support employees with disabilities including the provision of job accommodations that consider an employee's accessibility needs due to disability. Information is provided to new employees as soon as practicable, generally at the time of on-boarding. EdgePoint keeps employees up to date on changes to existing policies.

Upon request of an employee with a disability, EdgePoint will consult with the employee to provide accessible formats and the communication supports they require to perform their job.

3. Training

EdgePoint provides training on AODA regulation and the Human Rights Code to employees, volunteers and third-party representatives who provide goods, services, and facilities on behalf of EdgePoint. Training is provided in a way that best suits the duties of the employees and contractors. Training is incorporated into the new hire onboarding process and records are maintained. EdgePoint strives to ensure that its learning offerings are accessible, or accessible formats are made available. Its team also responds to concerns about accessibility on a case-by-case basis and is dedicated to updating content to meet accessibility standards when deemed necessary.

4. Workplace emergency response information

Where EdgePoint is aware that an employee has a disability and there is a need for accommodation, individualized workplace emergency response information to employees will be provided as soon as practicable after becoming aware of the need for accommodation. With the employee's consent, this information will be shared with people designated to assist them in an emergency. The plan will be reviewed on a periodic basis as well as when the individual's accommodation needs change.

5. Documented individual accommodation plans

EdgePoint will accommodate an employee with a disability. It has a process for the development of a documented individual accommodation plan for each employee with a disability if required. EdgePoint ensures the process for the development of documented individual accommodation plans includes the following elements:



- Input from the employee in the development of the plan
- Inclusion of individualized workplace emergency response information, if required, and identification of any other accommodation that is to be provided
- Information provided in accessible formats and communication supports made available as necessary
- Steps to protect the privacy of the employee's personal information
- Frequency in which individual accommodation plans will be reviewed and updated

6. Return to work process

EdgePoint ensures there is a documented return to work process for employees who have been absent from work due to a disability. This includes steps EdgePoint will take to facilitate the return to work and will include documented individual accommodation plans as part of the process.

7. Performance management, career development and redeployment

EdgePoint will take into consideration the accessibility needs of employees with disabilities, as well as individual accommodation plans, when conducting performance management, providing career development, advancement to employees and reassignment to other jobs or departments within the company.

8. Design of Public Spaces

EdgePoint will take into consideration any accessible elements, as defined by AODA's public space requirements in the design, construction, or renovation of public spaces to comply with all applicable requirements.

9. Customer Service

In accordance with the Customer Service Standards requirements in the AODA, EdgePoint allows the use of support persons and service animals and ensures that training meets the content requirements of the Customer Service Standards.

10. Benefits

EdgePoint conducts regular reviews of its employee benefits and offerings to confirm it provides valuable coverage, flexibility, and choice to meet its employees' diverse 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:

EdgePoint Wealth Management
150 Bloor Street West, Suite 500
Toronto, ON M5S 2X9