



Accessibility Policy

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1. Statement of Commitment to Creating and Maintaining Accessibility and an Accessible Environment.

Addenda Capital is committed to providing an accessible environment in which all individuals have equal access to Addenda Capital services and programs in a way that respects the dignity and independence of persons with disabilities. This includes creating and fostering an inclusive environment that is considerate and accommodating for all individuals, including people with disabilities. We will continue to prevent barriers by designing inclusive and supportive positive attitudes and preventing attitudes which devalue and limit the potential of persons with disabilities.

Addenda Capital supports the goals of the Accessibility for Ontarians with Disabilities Act (AODA) and will establish policies, practices and procedures which are consistent with the accessibility standards established under the AODA, including accessible customer service, information and communication, employment, the built environment and transportation.

In working towards its goals under this Statement, Addenda Capital is committed to becoming a barrier free environment and meeting the requirements of all existing legislation and its own policies and goals related to identifying, removing and preventing barriers to people with disabilities that might interfere with their ability to make full use of the services provided by Addenda Capital.

2. Definitions

2.1 Disability

In accordance with Human Rights legislation, a disability is defined as follows:

a) Any degree of physical disability, infirmity, malformation or disfiguration caused by bodily injury, birth defect or illness and includes but is not limited to:

- Diabetes mellitus;
- Epilepsy;
- A brain injury;
- Any degree of paralysis;
- Amputation;
- Lack of physical coordination;

- Blindness or visual impediment;
- Deafness or hearing impediment;
- Muteness or speech impediment; or
- Physical reliance of a guide dog or other animal, or on a wheelchair or other remedial appliance or device.

b) A condition of mental impairment or a developmental disability;

c) A learning disability, or a dysfunction in one or more of the processes involved in understanding or using symbols or spoken language;

d) A mental disorder; or

e) An injury or disability for which benefits were claimed or received under the insurance plan established under the Workplace Safety and Insurance Act, 1997.

2.2 Barrier

A barrier is anything that prevents a person with a disability from fully taking part in society because of that disability. Some barriers include:

- Physical barriers (e.g. a step at the entrance to the building or a door that is too heavy to be opened by an individual with limited upper body mobility and strength);
- Architectural barriers (e.g. A hallway or door that is too narrow for a wheelchair or scooter);
- Information or communication barriers (e.g. a publication that is not available in large print);
- Attitudinal barriers (e.g. assuming people with a disability cannot perform a certain task when in fact they can or ignoring a customer in a wheelchair);
- Technological barriers (e.g. a website that is not accessible for people who require the use of screen readers);
- Barriers created by policies or practices (e.g. Not allowing animals on the premises, excluding or removing individuals who require the use of service animals).

2.3 Description

Addenda Capital is committed to reducing/eliminating barriers in its environment for staff, clients and customers with disabilities as well as providing services to these individuals in accordance with the requirements of all Human Rights legislation and other provincial legislation such as AODA. As legislation changes and develops, Addenda Capital will review, and change as necessary, its policies, practices and procedures to reflect any changes made in legislation.

To achieve this goal, Addenda Capital will endeavour to take the following steps:

- a) Identification of Barriers;**
- b) Removal of Identified Barriers;**
- c) Prevention of Barriers;**
- d) Increase Awareness of Accessibility Initiatives at all levels of the organization;**
- e) Promotion of compliance policies and procedures with respect to accessibility to both staff and clients.**

3. Associated Policies

3.1 Customer Service Policy

a) Purpose

Addenda Capital Accessibility Policy and Statement of Commitment to providing accessible customer service gives guidance to the delivery of services to people with disabilities, in compliance with requirements of provincial legislation such as Accessibility for Ontarians with Disabilities Act (AODA). This applies to all Addenda Capital staff, volunteers, third party contractors who deal with the public on behalf of Addenda Capital, and those who are involved in Addenda Capital policy and procedure development.

The Senior Management of Addenda Capital is committed to, and will work to improve access and opportunity for people with disabilities by identifying, removing and preventing barriers that might interfere with their ability to make full use of the services. They will foster an inclusive and accessible business environment for people of all needs and abilities. Should there be any unexpected accommodations that need to be made to allow an individual access to our environment; Addenda Capital will make the necessary provisions to allow access.

b) Policy

Customer Service Philosophy

Addenda Capital goal is to deliver exceptional customer service that meets and exceeds customer expectations. We endeavor to service our customers in a manner that reflects the principles of dignity, independence, integration and equal opportunity. Our commitment is to provide all customers, including those living with disabilities, the same opportunity to access our goods and services and benefit from those goods and services in the same place and in a similar way.

c) Guiding Principles

The following guiding principles clarify expected attitudes and behaviours in daily work life with customers and each other:

- **Respect:** Each of us will demonstrate honesty, integrity and belief in people.
- **Ownership:** Each of us is accountable for creating an environment that contributes to the success of our customers and each other.
- **Collaboration:** Each of us has an important role in working together for a common purpose.
- **Continuous Improvement:** Each of us is committed to ongoing improvement in all we do to anticipate and exceed needs as they evolve.

d) Providing Goods and Services to People with Disabilities

Addenda Capital is committed to excellence in serving all customers including persons with disabilities by removing barriers to their full participation that might arise in the course of doing business as follows:

- **Communication:** We will communicate with people with disabilities in ways that take into account their disability. We will train staff who communicate with customers on how to interact and communicate with people with various types of disabilities.
- **Telephone Services:** We are committed to providing fully accessible telephone interface to our clients and potential clients. We will train staff to communicate with customers over the telephone in clear and plain language and to speak clearly and slowly if required by the customer. We will offer to communicate with customers using email if telephone communication is not suitable to their communication needs or is not available. Training will be provided on how to use the Relay system and TTY (teletypewriter) when needed.
- **Assistive Devices:** We are committed to serving people with disabilities who use assistive devices to obtain, use or benefit from our goods and services and as such, clients are free

to use their personal assistive devices in any Addenda Capital environment. Addenda Capital offers other measures that may assist our clients while on site and we will ensure that our staffs are familiar with the various assistive devices that may be used by clients including: elevators, escalators, wheelchair ramps and automatic doors. Assistive devices for access to specific services shall be kept in good working order and the public shall be informed of their availability.

- **Billing:** We are committed to providing accessible invoices to all of our customers. We will answer any questions customers may have about the content of the invoice in person, by telephone or email.
- **Documentation:** All published documents can be available in hard copy, large print and email if requested.

e) Service Animals

Staff, volunteers and third party contractors shall accommodate the use of service animals by people with disabilities who are accessing our services and facilities.

A guide dog is defined in Section One of the Blind Persons' Rights Act. To be considered a service animal under this Customer Service Policy, it must be readily apparent that the animal is being used because of a person's disability or the person with a disability must provide a letter from a physician or nurse confirming that it is required because of his or her disability.

f) Support Persons

Where a person with a disability is accompanied by a support person, Addenda Capital staff, volunteers and third party contractors shall ensure that both persons are permitted to enter the premises together and shall ensure that the person with a disability can access the support person while on the premises.

A support person is a person who accompanies the person with a disability in order to help with communication, mobility, personal care or medical needs or with the access to goods or services. The support person can be a paid support worker, volunteer, a friend or a family member.

g) Notice of Temporary Disruption

Addenda Capital will provide customers with notice in the event of a planned or unexpected disruption in the facilities or services usually used by persons with disabilities. This notice will include information about the reason for the disruption, its anticipated duration, and a description of alternative facilities or services, if available.

Notice of a service disruption will be placed in a conspicuous area and/or communicated by any method deemed to be reasonable under the circumstances.

h) Training of Staff

Addenda Capital will provide training to all staff and others who deal with the public as well as those who are involved in the development of corporate policies, practices and procedures. Addenda Capital will also ensure that the staff of any third parties acting on their behalf, have received training on serving our clients with disabilities..

Training will cover the following:

- 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.
- How to use any of Addenda Capital assistive devices.
- What to do if a person with a disability is having difficulty accessing Addenda Capital goods and services.
- Addenda Capital policy, practice and procedures relating to the Customer Service Policy.
- Those involved in policy development will receive additional training about providing goods or services to the public or third parties.

Training for new staff members will occur within the first month of employment as part of Addenda Capital orientation training for new staff. Ongoing training will be provided to all staff with respect to any changes to Addenda Capital policies, practices and procedures.

i) Communication and Feedback Process

Documentation that describes our accessibility commitments will be maintained on Addenda Capital website and provided to individuals, upon request, in the appropriate format.

Comments on our services and how well those expectations are being met are welcome and appreciated. Addenda Capital will thoroughly review all customer feedback, investigate its relevance to our Customer Service Policy and to our accessibility commitments, and determine actions or steps to rectify to the customer's satisfaction.

Feedback regarding the way in which Addenda Capital provides goods and services to persons with disabilities can be shared through our website, by email, verbally or in written format.

j) Questions Concerning This Policy

Any client questions about this policy should be referred to compliance@addendacapital.com. Internal questions should be directed to the Chief Compliance Officer.