



ACCESSIBILITY PLAN

Investors Group is committed to meeting the needs of all individuals. We strive to respect the dignity and independence of people with disabilities.

This accessibility plan outlines our strategy for preventing and removing barriers to accessibility and, at a minimum, meeting the requirements set out in the *Accessibility for Ontarians with Disabilities Act, 2005* and related standards and regulations (AODA).

This plan applies to all individuals who interact with the public on behalf of Investors Group in Ontario as well as those located elsewhere but with applicable oversight responsibilities.

ABOUT AODA

AODA was passed by the Ontario legislature to recognize the history of discrimination against persons with disabilities in Ontario and benefit all Ontarians by, among other goals, developing, implementing and enforcing certain accessibility standards.

To date, accessibility standards have been developed in:

- customer service;
- information and communications;
- employment;
- transportation; and
- the built environment.

Two regulations have been established under AODA:

- *Accessibility Standards for Customer Service*, O Reg 429/07 (the “**Customer Service Standard**”) and,
- *Integrated Accessibility Standards*, O Reg 191/11 (the “**Integrated Standards**”) and, collectively with the Customer Service Standard, the “**Regulations**”).

AODA will be phased in over time until 2021, as defined in the regulations.

PART A: GENERAL

In 2011, Investors Group created an interdepartmental committee to review AODA requirements and to implement a coordinated strategy for applying the accessibility standards under the Regulations. A Human Resources Steering Committee oversees and approves the accessibility policy and plan to ensure that we comply with our regulatory obligations.

1. Accessibility Policy, Practices and Procedures

Investors Group has corporate policies, practices and procedures which address obligations to respect the dignity and independence of individuals living with disabilities and provides opportunities equal to that of others, including:

- accessible customer service in keeping with the Customer Service Standard; and
- accessibility standards in accordance with the Integrated Accessibility Standards

Our Accessibility Policy describes, amongst other things, how we achieve or how we will provide notice of temporary service disruption, training requirements, handling of customer feedback and/or concerns, how best to provide accessibility and information communication and employment supports. Our policy and supporting practices and procedures are regularly reviewed and updated, when required.

2. Training

Investors Group offers training to those included under this plan on:

- Accessible Customer Service for the provision of financial products and services to persons with disabilities; and
- Integrated Accessibility Standards, and where appropriate, human rights legislation as it pertains to individuals with disabilities

Additional training will be offered should relevant accessibility policies, practices or procedures materially change.

A record of completed training is maintained.

PART B: THE CUSTOMER SERVICE STANDARDS

In addition to the information included in the documentation and training described in Part A, the following provides further detail about how we satisfy the Customer Service Standard:

1. Use of Service Animals, Support Persons and Assistive Devices

Individuals with a disability may enter an Investors Group premise when accompanied by a:

- Support person. The individual has access to the support person; however, we may require the individual with a disability to provide consent to talk about confidential information in the presence of the support person.
- Service animal. The individual may keep the animal with them and is responsible for its care and control at all times.

Individuals with a disability can use their own assistive devices when carrying out activities. It is the responsibility of the individual with a disability to ensure their device is operated in a safe and controlled manner at all times.

2. Feedback Processes Regarding Provision of Services to Persons with Disabilities

Feedback and concerns about the manner in which we provide services to those with disabilities is welcomed using the Contact Us link.

All accessibility concerns received are tracked to ensure they are handled in accordance with our usual process for resolving customer concerns. Feedback related to accessibility that does not specify a concern, is also tracked, to help ensure the needs of individuals with disabilities are properly addressed.

3. Notice of Temporary Service Disruptions

Investors Group will provide a notice if there is a temporary disruption in facilities or services used by persons with disabilities. This will include the reason for any disruption, anticipated duration and directions to alternative facilities or services, if available. The notice will be provided in a reasonable manner.

PART C: INTEGRATED ACCESSIBILITY STANDARDS

In addition to the information included in the documentation and training described in Part A, the following provides further detail about how we satisfy the Integrated Accessibility Standards:

1. Accessibility of Self-serve Kiosks

Investors Group does not presently offer products or services via self-serve kiosks.

2. Accessible feedback/complaints and processes

Investors Group provides a number of ways for a person to contact us or to arrange for the provision of accessible formats and communication supports, upon request.

3. Accessible formats and communication supports

When requested, we will consult with a person with a disability to provide for or arrange suitable alternative formats or communication supports in a timely manner.

4. Accessible Websites and Web Content

- a. All current websites conform to the World Wide Web Consortium's Web Content Accessibility Guidelines ("**WCAG**") 2.0 Level A.
- b. Investors Group will ensure that all websites conform to WCAG 2.0 Level AA by January 1, 2021.

EMPLOYMENT STANDARDS

Investors Group is committed to providing an equal opportunity environment where individuals with disabilities will be accommodated, when requested, in accordance with applicable legislation. These accommodations will be provided during the recruitment, assessment and selection process and once the individual has started with us.

We will work with individuals, upon request, to provide or arrange for the provision of information in accessible formats and communication supports, in a manner that is suitable, and is

- Needed in order to perform the individual's role; and
- Generally available to others in the workplace

When disability related accommodations are required, we will work with the individual to document an individual accommodation plan, as well as when facilitating the return to work for individuals who have been absent from work due to a disability.

Accessibility needs, as well as any individual accommodation plans, are taken into account when providing career development, performance management and when considering redeployment.

Individualized workplace emergency response information is provided to each individual who has a disability, when requested.

Information about supports and the provision of accommodations specific to individual needs are included in the documentation described in Part A and have been communicated and made available to those included under the Accessibility Plan.

BUILT ENVIRONMENT STANDARDS

Where we own property, undertake to build new structures or make major changes to existing structural features, we are committed to meeting the design and accessibility requirements of AODA to remove barriers in public spaces, such as outdoor public eating areas, walkways and accessible parking on and off street by January 1, 2017.