BAROMETER CAPITAL MANAGEMENT Inc. ACCESSIBILITY POLICY

1. Purpose

This policy relates to standards for providing the services of Barometer Capital Management Inc. (“Barometer”) to people with disabilities.

Policy Statement

Barometer enjoys a reputation as a respected national asset management firm. Daily, our people demonstrate a consistent ability to provide practical, creative and cost-effective advice, combined with an unyielding service commitment to our clients.

In fulfilling our mission, Barometer strives at all times to provide its services in a way that respects the dignity and independence of people with disabilities. We are also committed to giving people with disabilities the same opportunity to access our services and allowing them to benefit from the same services, in the same place and in a similar way as other clients.

Application of the Accessible Client Service Policy

The Accessible Client Service Policy applies to all individuals who provide services on behalf of Barometer. In this policy, the term employee includes all portfolio managers, client service representatives, trading, operations, compliance and administration of the firm.

Definitions

“Assistive devices” shall mean an auxiliary aid such as communication aids, cognition aids, personal mobility aids and medical aids (i.e., canes, crutches, wheelchairs, or hearing aids).

“Persons with Disabilities” shall mean those individuals who have a disability. “Disability” as defined under the Ontario Human Rights Code is:

(a) any degree of physical disability, infirmity, malformation or disfigurement that is caused by bodily injury, birth defect or illness and, without limiting the generality of the foregoing, includes diabetes mellitus, epilepsy, a brain injury, any degree of paralysis, amputation, lack of physical co-ordination, blindness

This policy is guided by the Accessibility for Ontarians with Disabilities Act (AODA) Accessibility Standards for Customer Service, 429/07.
or visual impediment, deafness or hearing impediment, muteness or speech impediment, or physical reliance on a guide dog or other animal or in 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.

“Service Animals” shall mean any animal individually trained to do work or perform tasks for the benefit of a person with a disability. “Support persons” shall mean any person whether a paid professional, volunteer, family member, or friend who accompanies a person with a disability in order to help with communications, personal care or medical needs or with access to products or services.

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1.1 Providing services to people with disabilities

Barometer is committed to excellence in serving all clients including people with disabilities and we will carry out our functions and responsibilities in the following areas:

1.1.1 Communication

We will communicate with people with disabilities in ways that take into account their disability.

We will train employees who communicate with clients on how to interact and communicate with people with various types of disabilities.

1.1.2 Telephone services

We are committed to providing fully accessible telephone service to our clients. We will train employees and staff to communicate with clients over the telephone in clear and plain language and to speak clearly and slowly.

We will offer to communicate with clients by telephone relay, email, courier, mail and/or fax, if telephone communication is not suitable to their communication needs or is not available, provided the identity of the client has been verified.
1.1.3 Assistive devices

We are committed to serving people with disabilities, who use assistive devices to obtain, use or benefit from our services. We will ensure that our employees are trained and familiar with various assistive devices that may be used by clients with disabilities while accessing our services.

We will also ensure that employees will know how to use, and instruct others in the use of, assistive devices if they are available for clients at the Barometer office.

1.1.4 Accessible Document Formats

Within a reasonable time after receiving a request by, or on behalf of a person with a disability, Barometer shall make documents available in a format that is accessible to the person, unless it is not technically feasible to do so.

1.1.5 Service Animals

We are committed to welcoming people with disabilities who are accompanied by a service animal on the parts of our premises that are open to the public and other third parties. The service animal must be in the care of the person with a disability or their support person at all times.

We will also ensure that all employees dealing with the public are properly trained in how to interact with people with disabilities who are accompanied by a service animal.

1.1.6 Support Persons

We are committed to welcoming people with disabilities who are accompanied by a support person. Any person with a disability who is accompanied by a support person will be allowed to enter the parts of our premises that are open to the public with his or her support person. At no time will a person with a disability who is accompanied by a support person be prevented from having access to his or her support person while on our premises.

Where confidentiality is important because of the kinds of information discussed, Barometer will obtain the consent of the client and may require the support person to sign a confidentiality and consent agreement.

1.1.7 Notice of temporary disruption

Barometer will provide clients with notice in the event of a planned disruption in the facilities or services usually used by people with disabilities. In the event of an unexpected disruption, Barometer will make reasonable efforts to contact clients with disabilities regarding disruptions prior to their scheduled meetings. This notice will include information about the reason for the disruption, its anticipated duration, and a description of alternative facilities or services, if available.
The notice will also be placed at public entrances, where applicable, in accordance with building policy.

1.1.8 Training for employees

Barometer will provide training to all employees who deal with the public or other third parties on our behalf, and all those who are involved in the development and approval of client service policies, practices and procedures.

This training will be provided during the new employee orientation period and will include 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 the assistive devices at the Barometer office that may help with the provision of services to people with disabilities.
- What to do if a person with a disability is having difficulty in accessing Barometer’s services.
- Barometer’s policies, practices and procedures relating to Accessible Client Services.
- The purposes of the Accessibility for Ontarians with Disabilities Act, 2005 and the requirements of the Accessibility Standards for Customer Service (Ontario only).

All employees will be trained on policies, practices and procedures that affect the way services are provided to people with disabilities. Employees will also be trained on an ongoing basis when changes are made to these policies, practices and procedures.

1.1.9 Feedback process

The ultimate goal of Barometer is to meet and surpass client expectations while serving clients with disabilities. Comments on our services regarding how well those expectations are being met are welcome and appreciated.

Feedback regarding the way Barometer provides services to people with disabilities can be made in the following ways:

By emailing us at info@barometercapital.ca, contacting us through our website at www.barometercapital.ca or by directly contacting the Vice-President of Operations:

Clients can expect to hear back within 10 business days. Our response will be in a format that respects the communication preference of the person with a disability. Additional time may be required for follow up depending on the format of response required.
1.2 Modifications to this or other policies

We are committed to developing client service policies that respect and promote the dignity and independence of people with disabilities. Therefore, no changes will be made to this policy before considering the impact on people with disabilities.

Any policy of Barometer that does not respect and promote the dignity and independence of people with disabilities will be modified or removed.

1.3 Questions about this policy

This policy exists to achieve service excellence to clients with disabilities. If anyone has a question about the policy, or if the purpose of a policy is not understood, an explanation should be provided by Barometer. Please send all inquiries to info@barometercapital.ca and they will be redirected accordingly.