

## **Accessible Customer Service Policy**

### **1. Our Commitment**

Credential Financial Strategies Inc. (“Credential”) is committed to providing its goods and 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 goods and services and allowing them to benefit from the same services, in the same place and in a similar way as other clients.

### **2. Providing Goods and Services to Persons with Disabilities**

Credential is committed to excellence in serving our diverse user community, including persons with disabilities. We will carry out our functions and responsibilities in the following areas:

#### **2.1. Communication**

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

Employees who communicate with clients will be trained on how to interact and communicate with people with various types of disabilities.

#### **2.2. Telephone Services**

Fully accessible telephone service will be provided to our clients. Our employees will be trained to communicate with clients over the telephone in a clear and plain language and to speak clearly and slowly.

We will offer to communicate with clients by email, mail, fax or, if required, in person, if telephone communication is not suitable to their needs or is not available.

#### **2.3. Assistive Devices**

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

#### **2.4. Service Animals and Support Persons**

We welcome people with disabilities who are accompanied by a service animal on the parts of our premises that are open to the public.

We also welcome 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 our premises 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.

Consent from the person with a disability is required when communicating private issues related to the person with a disability, in the presence of a support person.

## **2.5. Notice of Temporary Disruption**

Clients will receive as much notice as possible in the event of a planned or unexpected disruption in the facilities or services usually used by persons with disabilities. Legislation requires this notice to include information about the reason for the disruption, its anticipated duration, and a description of alternative facilities or services, if any, that are available.

Notice will typically be placed at all public entrances to our premises, and may also be located at service counters.

## **2.6. Training for Employees**

All employees and others who deal with the public or other third parties on our behalf, and all those who are involved in the development and approvals of client service policies, practices and procedures will receive training.

Training will include the following:

- A review of the purposes of the *Accessibility for Ontarians with Disabilities Act (AODA)* and the requirements of the customer service standard under the OADA.
- 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 equipment or devices available on the premises or otherwise that may help with the provision of goods or services to people with disabilities.
- What to do if a person with a disability is having difficulty in accessing Credential's goods and services.
- A review of policies, practices and procedures relating to the customer service standard.

## **3. Our Policy**

Effective January 1, 2012, Credential (along with other businesses in Ontario) is required to comply with the customer service standard under the AODA.

For more information on the standard, visit [ontario.ca/AccessON](http://ontario.ca/AccessON).

### **3.1. Modifications to This or Other Policies**

We are committed to developing customer service policies that will 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 clients with disabilities.

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

### **3.2. Questions about this Policy**

This Policy exists to deliver service excellence to clients with disabilities. If anyone has a question about the Policy, or if the purpose of the Policy is not understood, an explanation will be provided by the AODA Officer at Credential (for contact information, see section 4.1, Complaint Process).

### **3.3. Availability of Documents**

In addition to this online version of Credential's policy statement, the Policy and all other documents required by the customer service standard related to Credential's policies, practices and procedures on providing services to persons with disabilities can also be obtained by contacting the AODA Officer.

This documentation will be made available upon request to clients with disabilities in a format that takes into account their disability. The length of time it will take to provide information in alternative formats will depend on the format requested. Every effort will be made, however, to process requests in a timely fashion.

## **4. Your Feedback Matters**

Feedback regarding the way Credential provides goods and services to people with disabilities can be made by using the process outlined below. All feedback is taken seriously and each communication is directed to the responsible department for review and necessary action.

### **4.1. Complaint Process**

If you have a problem, issue or complaint of any sort, we encourage you to contact us following the process outlined below.

#### **Step 1**

To help us resolve your situation quickly, please gather all the relevant information, such as:

- Your preferred method of reply: mail, email or phone (if phone, when is the best time to call)
- Date(s) of occurrence
- Supporting statements or documents, if any
- The names of any specific employees involved
- Brief overview of the situation that occurred

- Names of any individuals involved

## **Step 2**

Contact our AODA Officer:

By Mail:           Credential Financial Strategies Inc.  
                      800-1111 West Georgia Street  
                      Vancouver, BC V6E 4T6  
                      Attention: AODA Officer

By Fax:            604.714.3933

By Email:         [AODA\\_Officer@credential.com](mailto:AODA_Officer@credential.com)