

Fidelity Canada multi-year accessibility plan

This accessibility plan outlines the policies and actions that Fidelity Canada has put in place to improve opportunities for people with disabilities.

Note: The Fidelity Canada multi-year accessibility plan was last updated on April 22, 2022.

Statement of commitment

Fidelity Canada 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 (AODA) and the Integrated Accessibility Standards Regulations (IASR).

Information and communications

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

1. Feedback, accessible formats and communication supports

Fidelity Canada has:

- processes for receiving and responding to feedback (including complaints) which are accessible to customers with disabilities

Information about Fidelity Canada's feedback process can be found in Fidelity Canada's Customer Service Policy.

When accessible formats and communication supports for persons with disabilities are requested, Fidelity Canada:

- provides or arranges for the provision of accessible formats and communication supports in a timely manner
- consults with the person making the request to determine the suitability of the accessible format or communication support

Fidelity Canada has notified the public regarding the availability of accessible formats and communication supports.

2. Accessible websites and web content

Fidelity Canada has:

- Assessed its website to identify areas with accessibility issues;
- Made its website and web content compliance with WCAG 2.0, Level AA, where practicable, including fund facts and prospectuses; and
- Fidelity Canada will follow AODA accessibility guidelines for any future website development.

Employment

Fidelity Canada is committed to fair and accessible employment practices across every stage of the employment cycle.

1. Recruitment general

Fidelity Canada notifies employees and the public of the availability of accommodation for applicants with disabilities in the recruitment process. This includes:

- a review and, as necessary, modification of existing recruitment policies, procedures and processes
- specifying that accommodation is available for applicants with disabilities, on the Fidelity website and on job postings

2. Recruitment, assessment, and selection

Fidelity Canada notifies job applicants when they are selected to participate in an assessment or selection process, that accommodations are available upon request in relation to the materials or processes to be used.

If a selected applicant requests an accommodation, Fidelity Canada will consult with the applicants and provide a suitable accommodation in a manner that takes into account the applicant's accessibility needs due to disability. This includes:

- a review and, as necessary, modification of existing recruitment policies, procedures and processes
- inclusion of availability of accommodation notice as part of the script in the scheduling of an interview and/or assessment
- if a selected applicant requests an accommodation, consult with the applicant and arrange for provision of suitable accommodations in a manner that takes into account the applicant's accessibility needs due to disability

3. Notice to successful applicants

When making offers of employment, Fidelity Canada notifies the successful applicant of its policies for accommodating employees with disabilities. This includes:

- a review and, as necessary, modification of existing recruitment policies, procedures and processes
- inclusion of notification of Fidelity Canada's policies on accommodating employees with disabilities in offer of employment letters

4. Informing employees of supports

Fidelity Canada informs all employees of policies that support employees with disabilities, including, but not limited to, policies on the provision of job accommodations that take into account an employee's accessibility needs due to a disability. This includes:

- informing current employees and new hires of Fidelity Canada's policies supporting employees with disabilities, including, but not limited to, policies on the provision of job accommodations that take into account an employee's needs due to disability
- providing information under this section as soon as practicable after the new employee begins employment, specification in the orientation process

- keeping employees up to date on changes to existing policies on job accommodations with respect to disability
- where an employee with a disability so requests it, Fidelity Canada will provide or arrange for provision of suitable accessible formats and communications supports for
 - information that is needed in order to perform the employee's job
 - information that is generally available to employees in the workplace
- in meeting the obligations to provide the information that is set out in the paragraph above, Fidelity Canada will consult with the requesting employee in determining the suitability of an accessible format or communication support

5. Training

Fidelity Canada provides training to employees and third party representatives who provide goods, services and facilities on behalf of Fidelity Canada on Ontario's accessibility laws and on the Human Rights Code as it relates to people with disabilities. The company maintains a record of dates when the training was provided and the names of individuals to whom it was provided.

6. Workplace emergency response information

Where Fidelity Canada is aware that an employee has a disability and that there is a need for accommodation, individualized workplace emergency response information will be provided to the employee as soon as practicable if such information is necessary given the nature of the employee's disability.

7. Documented individual accommodation plans/return to work processes

Fidelity Canada's existing policies include steps that the company will take to accommodate an employee with a disability and to facilitate an employee's return to work after absenteeism due to disability.

Fidelity Canada reviewed and assessed the existing policies to ensure that they included a process for the development of documented individual accommodation plans for employees with a disability, if such plans are required.

Fidelity Canada ensures that the process for the development of documented individual accommodation plans includes the following elements, in accordance with the provisions of the IASR:

- the manner in which the employee requesting accommodation can participate in the development of the plan
- the means by which the employee is assessed on an individual basis
- the manner in which Fidelity Canada can request an evaluation by an outside medical or other expert to assist in determining if and how accommodation can be achieved. This request is at the company's expense, excluding but not limited to, doctor's fees for form completion associated with leave of absences
- steps to protect the privacy of the employee's personal information
- the frequency in which individual accommodation plans will be reviewed and updated and the manner in which this will be done
- the provision to the employee of the reasons for the denial if an individual accommodation plan is denied
- the means of providing the individual accommodation plan in a format that takes into account the employee's accessibility needs
- if individual accommodation plans are established, ensure that they include
 - individualized workplace emergency response information that is required
 - any information regarding accessible formats and communication supports that have been provided for or arranged, in order to provide the employee with information
 - that is needed in order to perform the employee's job
 - that is generally available to employees in the workplace
- identify any other accommodation that is to be provided to the employee

Fidelity Canada ensures that the return to work process as set out in its existing policies outlines the steps the company will take to facilitate the employee's return to work after a disability-related absence, outlines the development of a written individualized return to work plan for such employees, and requires the use of individual accommodation plans, as discussed above, in the return to work process.

8. Performance management and career development

Fidelity Canada takes into account the accessibility needs of employees with disabilities, as well as individual accommodation plans

- when using its performance management process in respect of employees with disabilities
- when providing career development and advancement to its employees with disabilities

In accordance with the IASR, Fidelity Canada

- reviews, assesses and, as necessary, modifies existing policies, procedures and practices to ensure compliance with the IASR
- takes the accessibility needs of employees with disabilities and, as applicable, their individualized accommodation plans, into account when
 - assessing performance
 - managing career development and advancement
- takes into account the accessibility needs of employees with disabilities when providing career development and advancement to its employees with disabilities, including notification of the ability to provide accommodations on internal job postings

Customer Service

- Fidelity Canada has developed, implemented and maintained a policy governing the provision of goods and services to persons with disabilities in accordance with the AODA requirements. This policy is available in an accessible format or with a communication support, upon request.
- Fidelity Canada uses Relay Service to provide TTY-based telephone services to its customers as needed. Fidelity Canada provides staff members

with instructions on using the TTY-based service, including instructions to speak more slowly and how to use the TTY keys.

- Fidelity Canada allows the use of support persons and service animals in accordance with the Customer Service Standards requirements in the AODA.
- Fidelity Canada has developed a process for providing notice of temporary disruptions to facilities or services that persons with disabilities typically use and has set this process out in its Customer Service Policy.
- Fidelity Canada provides training to all employees and people who develop Fidelity Canada policies. Fidelity Canada ensures that training

meets the content requirements of the Customer Service Standards and has set out the required elements of the training in its Customer Service Policy. Fidelity Canada also has written materials available for staff members on supporting people with disabilities.

Design of Public Spaces

- If Fidelity Canada designs or builds public spaces, or has any accessible elements, as defined by the AODA's public space requirements, in the future, Fidelity Canada will comply with all applicable requirements.

Modifications to this or other policies

Fidelity Canada is committed to developing policies that respect and promote the dignity and independence of people with disabilities. No changes will be made to these policies before considering the impact on people with disabilities.

This Multi-Year Accessibility Plan is reviewed and/or updated at least once every five (5) years.

Feedback process and questions about this policy

Feedback can be provided to Fidelity Canada by phone, mail, fax, email or by other means, upon request. Complaints will be addressed in accordance with our regular complaint management procedures.

Phone

Fidelity representatives are available to speak to you from 8:00 a.m. to 8:00 p.m. EST, Monday to Friday.

Telephone: 416-307-5200
Toll-free: 1-800-263-4077
Fax: 1-800-387-8092
TTY: 1-800-855-0511

Mail

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This document is available in accessible formats upon request.