

Fidelity Canada multi-year accessibility plan (2014–2021)

This accessibility plan for 2014–2021 outlines the policies and actions that Fidelity Canada will put in place to improve opportunities for people with disabilities.

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

By **January 1, 2015**, Fidelity Canada will:

- have processes for receiving and responding to feedback which are accessible to customers with disabilities

By **January 1, 2016**, when accessible formats and communication supports for persons with disabilities are requested, Fidelity Canada will:

- provide or arrange for the provision of accessible formats and communication supports in a timely manner
- consult with the person making the request to determine the suitability of the accessible format or communication support
- notify the public regarding the availability of accessible formats and communication supports.

2. Accessible websites and web content

Fidelity Canada will take the following steps to make their websites and content on those sites conform with WCAG 2.0, Level AA by **January 1, 2021**:

- assess our website to identify areas with accessibility issues
- make the website more accessible as needed
- follow AODA accessibility guidelines for future website development

Employment

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

1. Recruitment general

By **January 1, 2016**, Fidelity Canada will notify employees and the public of the availability of accommodation for applicants with disabilities in the recruitment process. This will include

- 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

By **January 1, 2016**, Fidelity Canada will notify 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 will include

- 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

By **January 1, 2016**, when making offers of employment, Fidelity Canada will notify the successful applicant of its policies for accommodating employees with disabilities. This will include

- 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

By **January 1, 2016**, Fidelity Canada will inform 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 will include

- 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, specifically 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 will provide 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 by **January 1, 2015**. The company will maintain 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 will review and assess the existing policies to ensure that they include a process for the development of documented individual accommodation plans for employees with a disability, if such plans are required.

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

- include in the process the manner in which the employee requesting accommodation can participate in the development of the plan
- include in the process the means by which the employee is assessed on an individual basis
- include in the process 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 are in place to protect the privacy of the employee's personal information
- outline the frequency in which individual accommodation plans will be reviewed and updated and the manner in which this will be done
- provide the employee with the reasons for the denial if an individual accommodation plan is denied
- include in the process 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
 - information that is generally available to employees in the workplace
- identify any other accommodation that is to be provided to the employee.

Fidelity Canada will ensure 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 will take 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 will

- review, assess and, as necessary, modify existing policies, procedures and practices to ensure compliance with the IASR
- take the accessibility needs of employees with disabilities and, as applicable, their individualized accommodation plans, into account when
 - assessing performance
 - managing career development and advancement

- take 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

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

Mail

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Email

Send us a message at cs.english@fmr.com

This document is available in accessible formats upon request.