

Nicola Wealth Multi-Year Accessibility Plan

Note: The Nicola Wealth Multi-Year Accessibility Plan was last updated on November 2023.

Introduction

Nicola Wealth Management Ltd. (Nicola Wealth) was founded in 1994 with a handful of employees; we have now grown to over 500. While many things have changed, inclusion and a sense of belonging and purpose remains fundamentally core to our culture, our commitment to our clients, people and our business success.

Formalizing our strategy for accessibility practices for the firm is an intentional step in fostering a culture of belonging where diverse perspectives, skills, and backgrounds are welcomed and supported because it is the right thing to do for our people, clients, communities, and business.

Nicola Wealth is committed to excellence in serving and providing our products and services to all clients. Our policy has been drafted with the principles of independence, dignity, integration, and equality of opportunity for people with disabilities in mind.

Nicola Wealth's Multi-Year Accessibility Plan (MYAP) outlines key strategies that not only comply with the Accessibility for Ontarians with Disabilities Act (AODA) and the Integrated Accessibility Standards Regulations (IASR), but also fulfills our firm's commitment to integration and equality of opportunity for people with disabilities.

This evolving and dynamic plan demonstrates our ongoing commitment to eliminate barriers and improve accessibility for persons with disabilities. The MYAP will be reviewed and updated at least once every five years, and as required, to ensure compliance with the AODA and the IASR.

Our plan focuses on our initiatives in respect of the AODA's accessibility standards applicable to Nicola Wealth, which include:

- Customer/Client Service
 - Information and Communications
 - Employment
 - Training
 - Design of Public Spaces
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Customer/Client Service

Commitment: Nicola Wealth is committed to providing accessible client service to people with disabilities as outlined in the Nicola Wealth Accessibility Policy (the “Accessibility Policy”).

Initiatives: Nicola Wealth has and will continue to implement client service initiatives in accordance with the AODA through the following steps:

- Implementing and maintaining our Accessibility Policy governing the provisions of services to persons with disabilities in accordance with AODA requirements.
- Allowing the use of service animals or support persons in accordance with the Customer Service Standard requirements in the AODA.
- Following a process for providing notice of temporary disruptions to offices or services that persons with disabilities may typically use.
- Providing training to all persons who participate in developing the organization’s policies and all Ontario based Nicola Wealth employees and affiliates as set out in our Accessibility Policy.

Responsibility: Compliance Solutions; People and Culture; Office Services; Marketing

Information and Communications

Commitment: Nicola Wealth is committed to making our information and communications accessible to people with disabilities

Initiatives: In accordance with the AODA’s information and communication guidelines, Nicola Wealth will:

- Ensure our website and web content conform with Web Content Accessibility Guidelines (WCAG) 2.0 Level AA website requirements.
- On request, provide documents in accessible format and communications supports with people with disabilities in a timely manner and at no additional cost.
- On request, ensure all communications with personnel take into account employee accessibility needs.

Responsibility: Compliance Solutions; Marketing, People & Culture

Employment

Commitment: We are committed to fair, inclusive, and accessible employment practices.

Initiatives: In accordance with AODA's employment standards, Nicola Wealth will continue to implement policies for recruitment, employment, training, and professional development within the firm for people with disabilities.

- Informing applicants of our commitment to accessibility and availability of accommodation for applicants with disabilities in the recruitment process.
- Provision of accessible formats and communication supports based on an applicant or employee's accessibility needs.
- Taking employee's disabilities and accommodation needs into account with respect to performance management and career development.
- Ensuring processes are in place to support employee/workplace accommodation requests following absences from work and during an employee's employment.
- Providing individualized workplace emergency response information to employees with self-disclosed disabilities.

Responsibility: Compliance Solutions; People and Culture

Training

Commitment: Nicola Wealth is committed to providing training in the requirements of Ontario's accessibility laws and the Ontario Human Rights Code as it applies to people with disabilities.

Initiatives: Nicola Wealth has and will continue to implement policies and training initiatives in accordance with the AODA through the following steps:

- A policy outlining our commitment to accessibility for client, prospective clients, applicants for employment, and employees.
- Training all persons who participate in developing the organization's policies and all Ontario based Nicola Wealth employees and affiliates on accessibility standards and human rights legislation, as it pertains to people with disabilities.
- Maintaining a statement of our firm's commitment to meet the accessibility needs of persons with disabilities in a timely manner and in compliance with AODA and IASR.

A Workplace Emergency Response Plan will be provided to employees who have indicated to the firm that they have a disability and require assistance in the event of an emergency.

Responsibility: Compliance Solutions; People and Culture; Office Services

Design of Public Spaces

Commitment: Nicola Wealth will meet accessibility laws and regulations when building or making major changes to public spaces.

Initiatives: As of November 2023, Nicola Wealth does not have any plans for new construction or significant redevelopment of its Ontario offices to which the design of public spaces standards as outlined in the IASR are applicable. If Nicola Wealth designs or builds public spaces, as defined by the AODA's public space requirements, we will comply with all applicable requirements.

Responsibility: Compliance Solutions; Office Services

More Information

For more information regarding accessibility at Nicola Wealth or to request an accessible format of this plan, please contact Compliance Solutions at:

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