

AGF Accessible Customer Service Policy

Providing Goods and Services to People with Disabilities

Our mission

AGF's mission is to help investors succeed. AGF has a long history with more than 50 years in the business, providing industry-leading investment management services through our core business AGF Investments.

Our commitment

In fulfilling our mission, AGF strives at all times to provide its services in a way that respects the dignity and independence of people with disabilities. We are 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 customers.

We will carry out our accessibility functions and responsibilities in the following areas:

Communication

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

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

Telephone communications

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

We will offer to communicate with customers by e-mail, relay services, company website, reading aloud and printed documents, if telephone communication is not suitable to their communication needs or is not available.

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 staff are trained and familiar with various assistive devices that may be used by customers with disabilities while accessing our services.

We will also ensure that our staff knows how to use the following assistive devices available on our premises for customers: accessible toilets/elevators, accommodating support persons and animals while on AGF's premises, specialized seating plans at onsite meetings/events, office computer equipment, printed documents and handwritten note-taking for communication.

AGF is open to accommodating any access needs, as requested, within reasonable timeframes. Where assistive devices cannot be immediately provided, AGF will suggest suitable alternatives.

Billing and statements

We are committed to providing accessible invoices and statements to all of our customers. For this reason, they will be provided in the following formats upon request: hardcopy, softcopy, large print and e-mail. AGF is open to accommodating customers' accessibility needs, as requested, within reasonable timeframes.

We will answer any questions customers may have about the content of the invoice or statement in person, by telephone or e-mail.

Use of service animals and support persons

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

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 AGF's 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.

Notice of temporary disruption

AGF will provide customers with notice in the event of a planned or unexpected disruption in the facilities or services usually used by people with disabilities. 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 be placed at all public entrances and service counters on our premises as well as on our website.

Training for staff

AGF will provide training to all employees, volunteers and others who deal with the public or other third parties on their behalf, and all those who are involved in the development and approvals of customer service policies, practices and procedures. Staff in the following business areas will be trained: Advisor Sales, Institutional Sales, Administration, Collections, Operations, Reception, Client Services and Mailroom.

This training will be provided as part of AGF's on-boarding process and within one month after staff commence their duties.

Training will include the following:

- The purposes of the Accessibility for Ontarians with Disabilities Act, 2005 and the requirements of the customer service standard.
- 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 accessible toilets/elevators, accommodating support persons and animals while on AGF's premises, specialized seating plans at onsite meetings/events, office computer equipment, printed documents and notepads/pens/pencils.
- What to do if a person with a disability is having difficulty in accessing AGF's services.
- AGF Management's policies, practices and procedures relating to the customer service standard.

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

Feedback process

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

Feedback regarding the way AGF provides services to people with disabilities can be made as follows:

- **AGF Investments and AGF subsidiaries:** E-mail complaints@agf.com or call AGF Investment’s Client Services at 1-800-268-8583
- **AGF Trust:** Send mail to AGF Trust Company, One Toronto Street, P.O. Box 6, Toronto, ON M5C 2V6, or call AGF Trust’s Client Services at 1-866-273-9971

All feedback will be directed to:

- **AGF Investments and AGF subsidiaries:** Senior Complaints Officer and/or Compliance Officer
- **AGF Trust:** Client Services Representative, or you may escalate any issues to the Supervisor of Client Services or Director of Client Services

Customers can expect to hear back with an acknowledgement of their feedback within 48 business hours.

Complaints will be addressed according to processes already established in AGF’s complaint management procedures.

Modifications to this or other policies

We are committed to developing customer 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 AGF that does not respect and promote the dignity and independence of people with disabilities will be modified or removed.

Questions about this policy

This policy exists to achieve service excellence to customers with disabilities. If anyone has a question about the policy, or if the purpose of a policy is not understood, an explanation will be provided by, or referred to Vice President, Organizational Development, Corporate Human Resources.