Assante® WEALTH MANAGEMENT | Assante Vancouver Centre

Client Meeting Safety Plan

Scheduling

- No more than two client meetings will be held in our office at a time. They will be staggered to allow time for prep and avoid having any physical interactions between clients and advisory teams.
- Meetings must be held in one of the two meetings rooms that are open (Middle and Board). We will adhere to our occupancy limits with 3 people in the middle meeting and 6 people in the Boardroom.
- Client meetings can be held any day in the week, meeting times between 10 am - 3 pm are strongly encouraged. If occupancy requirements of the month are met for the day, priority will be given to advisors being in the office.
- When booking client meetings, advisory teams will give our receptionist notice 48 hours prior to the meeting. Our receptionist will require:
    - Names of all people participating in the meeting
    - Approx. length of meeting
    - Any technology requirements needed
- To schedule meeting rooms for internal meetings, teams must reach out to our receptionist in advance. This ensures our protocols can be coordinated properly.

Cleaning

- Cleaning of rooms will be required after any use. For meetings held within the recommended schedule, the corporate operations team will conduct a clean of the room. If the meetings finish outside of our 3pm schedule, we will require that the team perform a clean of the space based on our cleaning protocol.
- 30 minutes between meetings is required so that meeting rooms can be sanitized.

Safety Restrictions

- Safe distancing is still required and we ask that room occupancy limits are adhered to. Chairs are positioned to ensure the 2 metres physical distancing recommendation is met.
- We ask that clients do not go to the kitchen, copy rooms, hallways or any of our working areas
- Clients must avoid the office if:
    - They have had symptoms of COVID-19 in the last 10 days; symptoms include fever, chills, new or worsening cough, shortness of breath, sore throat, and new muscle aches or headache. https://bc.thrive.health/
    - Anyone under the direction of the provincial health officer to self-isolate.
    - Anyone who has arrived from outside of the country in the last 14 days.
    - If you have been feeling unwell in the last 48 hours
- 14 days following a client meeting, if a client(s) becomes unwell with symptoms related to COVID-19 and/or have been instructed to self-isolate, a notice should be sent to the advisor. The advisor must notify the General Manager immediately to decide on course of action.

Process

- Prior to client meetings, advisory teams must review and familiarize themselves with the client meeting process:
  - Advisors should not show up early to meetings.
  - Clients will be shown directly into the meeting room when they have arrived. Corporate staff will notify teams of their arrival.
  - Face masks are located at the reception entrance for clients. Masks are required for clients in the reception area and hallways. *Even though physical distancing can be accommodated, given the space is enclosed we strongly recommended advisors and clients wear a mask during your meeting.*
  - Hand sanitizer is located in both reception and meeting rooms. If clients prefer to wash their hands, we ask that this be done in the washrooms.
  - Hangers will be placed in meeting rooms for clients to hang any clothing or personal items behind the door. We will not allow use of the closets at this time.
  - There will be minimal stationary available in the rooms to limit high touch points. If a client requires use of a pen we suggest the client keep the pen or corporate staff be notified of items used to then disinfect such items.
  - Bottled water will be provided in the rooms for each meeting.
  - Hot beverages, newspapers and magazines will not be available.