



ASSANTE
WEALTH MANAGEMENT

Assante
Vancouver Centre

Client Meeting Safety Plan

Updated November 2020

Scheduling

- Meetings can be held in any of our four meeting rooms. We will adhere to our occupancy limits with 2 people in the left meeting room, 4 people in the new meeting room, 4 people in the middle meeting, and 8 people in the Boardroom.
- Client meetings can be held any day in the week, meeting times between 8:30 am – 4:00 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, and email addresses
 - Approx. length of meeting
 - Any technology requirements needed
- Prior to meetings, our receptionist will email clients an outline of our safety processes and they will be asked to confirm their receipt and understanding.
- 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 between meetings. 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.
 - 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.*
 - Clients will be asked to answer a COVID screening questionnaire upon arriving. We also have an infrared thermometer available for those who opt to have their temperature taken. *Temperature readings are not mandatory.*
 - Clients will be shown directly into the meeting room when they have arrived. Corporate staff will notify teams of their arrival.
 - 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.
 - Coat hooks are available in all 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.