

ACCESSIBLE CUSTOMER SERVICE PLAN (ONTARIO)

Purpose

Morningstar Inc. (“the Company”) is committed to excellence in serving all customers including people with disabilities.

Assistive devices

We will ensure that all staff who provide customer service or create customer service plans, are trained and familiar with various assistive devices that may be used by customers with disabilities while accessing our goods or services.

Communication

We will communicate with people with disabilities in ways that consider their disability.

Service animals

We welcome people with disabilities and their service animals. Service animals are allowed on the parts of our premises that are open to the public.

Support persons

A person with a disability who is accompanied by a support person will be allowed to have that person accompany them on our premises.

Notice of temporary disruption

In the event of a planned or unexpected disruption to services or facilities for customers with disabilities such as restrooms and elevators, the Company will notify customers promptly. This clearly posted notice will include information about the reason for the disruption, its anticipated length of time, and a description of alternative facilities or services, if available.

The notice will be placed with security located in the main lobby of the building.

Training for staff

The Company will provide training to Ontario employees, volunteers and others who deal with the public or other third parties on behalf of the Company. All employees will be trained. In addition, employees may require training on one or more of the standards— information and communications or employment, as it relates to the duties and responsibilities of their position and we have a system in place to accommodate the trainings as well as a way to document and track completion.

This training will be provided to staff within the first three months of employment. Training will include:

- An overview of the Accessibility for Ontarians with Disabilities Act, 2005 and the requirements of the customer service standard
- The Company's accessible customer service plan.
- 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
- What to do if a person with a disability is having difficulty in accessing the Company's goods and services

Staff will also be trained when changes are made to the Company's accessible customer service plan.

Feedback process

A process has been established to encourage feedback regarding the way we provide goods and services to people with disabilities. This feedback can be made verbally, by e-mail to askhr@morningstar.com, by feedback card or in writing. All feedback will be directed to People & Culture. Customers can expect to hear back within 5 business days. Complaints will be addressed according to our organization's regular complaint management procedures.

Modifications to this or other policies

The Company will make documents available in accessible formats or with communication support upon request.

Any policy of the Company that does not respect and promote the dignity and independence of people with disabilities will be modified or removed.