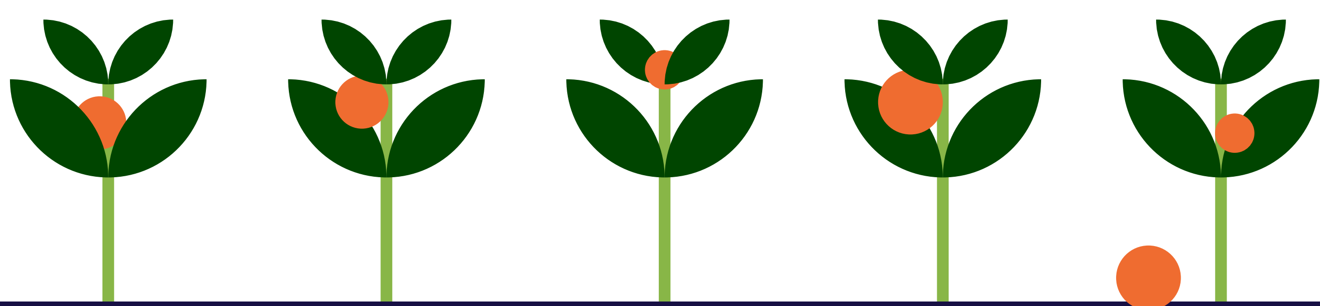
Justwealth

The Justwealth **Advisor Partnership Program** Guide



Who is the Justwealth Advisor Partnership Program ("APP") for?

Any forward-thinking Advisor who is interested in spending more time focusing on their client relationships and using Justwealth to assist with investment, administration and compliance related duties.

- IIROC Advisors
- Fee-only Advisors
- MFDA Advisors
- Insurance Agents

Simplify your business and take advantage of Justwealth's comprehensive lineup of cost-effective ETF portfolios!

How does the Justwealth APP work?

- Create an account and we will provide you with a unique access page, branded to your specifications, for your clients to use to join Justwealth
- Invite your clients to set-up their own Justwealth accounts using our Easy 1-2-3 sign-up process
- Your clients will receive the same benefits and privileges of our existing clients
- Your name and logo remain prominent on all Justwealth online client access and statements
- You receive online access to client-level and aggregated data for all of your client accounts PLUS support tools and materials
- You are now free to strengthen your business by devoting more time to the relationship management and planning that your clients value

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What does Justwealth do for you and your clients?

Your clients will enjoy access to all that Justwealth has to offer:

- Full suite of registered and non-registered account types
- Over 60 rigorously-constructed, ETF portfolios conveniently grouped into 5 families:
    - Domestic Growth; Global Growth; Income; US$; RESP Target Date
- One investment management fee of 0.40% covers all trading and custody costs*
- Daily portfolio monitoring and regular rebalancing
- Simple sign-up process
- Detailed 24/7 online access to account data

As a valued partner of Justwealth, you are free to take advantage of the resources of our dedicated institutional support team!

Justwealth will take care of compliance and administration related to your clients' Justwealth assets.

- Client onboarding
- KYC updates (Justwealth assets)
- Statements
- Tax receipts
- Pre-authorized contributions
- Electronic funds transfers
- Transfers-in-kind
- All other administrative forms

So you can focus on value-added activities.

* Minimum monthly fee of $10 per month applies to clients with combined assets <$25,000 with Justwealth.

How does Justwealth pay you?

Flexible payment options:

- You and your Dealer will set your own fee level charged to your clients based on one of our four options: 0.25%, 0.50%, 0.75%, 1.00%
- We collect fees from your clients and remit them to the Dealer quarterly

Reach out to us to discuss our flexible options today!

Why Justwealth?

Because your clients deserve the best!

- The robo industry's broadest set of portfolio solutions allows us to service ALL of your clients
- Our current clients have a wide-ranging set of investment and service needs:
  - Clients range from 20 year-olds to 90 year-olds
  - Available account types: RRSP, TFSA, RESP, RRIF, LIRA, LIF, Non-Registered
  - Fully automated, simple sign-up and investment process: Easy as 1-2-3
- Why choose a robo-advisor that only offers 5 or 10 portfolios? Can they truly service ALL of your clients?

Because you deserve a "Robo-Partner"!

Dedicated institutional support team with deep, relevant experience will service you and assist with your compliance and administration needs.

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The Justwealth Team

Executives with extensive investment industry experience

James Gauthier, MBA, CFA

Co-founder & Chief Investment Officer

Previous: BNS, TD, RBC, Mercer | Experience: 20+ years

James is a seasoned asset allocator who for over 20 years has devised some of the most innovative and sophisticated asset allocation policies for institutions, high net worth clients, and large wrap programs in Canada. James' portfolio construction expertise has been utilized by thousands of Financial Planners, Investment Advisors and Portfolio Managers across Canada.

Andrew Kirkland, CFP CIM

Co-founder & President

Previous: Invesco | Experience: 10+ years

Andrew is an experienced investment professional with unwavering passion for investing, financial planning, and client service. Over the last decade, Andrew assumed roles of increasing responsibility in the areas of operations, business development and client-servicing. Andrew takes great pride in providing outstanding service and quality advice to the Canadian investment community.

Richard Burton-Williams, MBA

Head of Justwealth Institutional

Previous: Barclays, Lehman, MRG | Experience: 15+ years

Richard's background in investment banking and consulting includes 15 years of advisory, client-service, finance, strategy and deal-making experience within Canada, the U.S. and internationally. Richard's experience has focused on the Canadian financial services sector, including assignments for some of Canada's largest banks, wealth managers, financial technology providers, specialty lenders and insurers.

Contact Us

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