Justwealth: The "A,B,Cs"

One of Canada's Leading Portfolio Managers

A. Who is Justwealth: An innovative online portfolio manager "aka" robo-advisor.

- ✅ Justwealth's mission is to bring **justice** to **overcharged** and **underserved** Canadian investors

- ✅ Justwealth was launched in 2016 and is registered in all 10 Canadian provinces

- ✅ Justwealth's seasoned management team averages 15+ years industry experience and has manged **tens of billions** of dollars

- ✅ Justwealth's **60+ innovative portfolios** include Tax-Efficient portfolios for non-registered accounts and Target Date RESPs

- ✅ **Impact on the Client:** Justwealth has more options to properly align your investment objectives with our portfolios

B. How Does it Work: Convenient and easy online sign-up!

1
Investment Questionnaire

Complete an Investment Questionnaire that captures your goals and risk tolerance

2
Personal Information

Complete a Personal Information Worksheet to tell us about yourself

3
Investment & Monitoring

Our sophisticated selection tool recommends your portfolio and your Personal Portfolio Manager implements your investment strategy

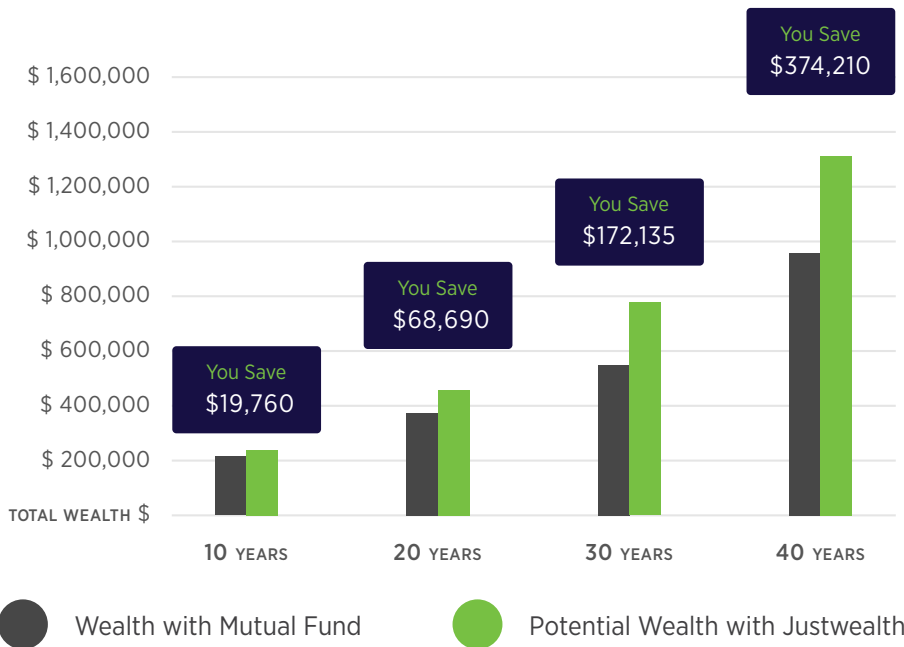*Wealth Professional Canada, 2019. James Gauthier, Chief Investment Officer, Justwealth.

✅✅ Justwealth

C. Our Offer to You: Low-cost, sophisticated investing.

Discounted Justwealth Management Fee:	**0.40%**
+	
Patrick Barkwell Advisor Referral Fee:	**0.50%**
+	
Typical Justwealth Portfolio Cost:	**0.20%**

Justwealth Total Fee:	**1.10%***
Typical Mutual Fund Fee:	**2.20%****

*Source: Justwealth. Includes Justwealth Management Fee (0.40%) + Patrick Barkwell Advisor Referral Fee (0.50%) + Typical Justwealth Portfolio MER (0.20%) resulting in an all-in fee of 1.10%.
**Source: Investor Economics and Strategic Insight: The Investment Funds Institute of Canada May 2015.

Impact of 1.1 % Extra Fees on $100,000

You Save $374,210

You Save $172,135

You Save $68,690

You Save $19,760

$ 1,600,000
$ 1,400,000
$ 1,200,000
$ 1,000,000
$ 800,000
$ 600,000
$ 400,000
$ 200,000
TOTAL WEALTH $

10 YEARS   20 YEARS   30 YEARS   40 YEARS

● Wealth with Mutual Fund   ● Potential Wealth with Justwealth

Note: Illustrative growth example assumes a $100,000 non-taxable account with a 6% return and a $5,000 annual contribution.

Get Started at: justwealth.com/barkwell-wealth

Contact Your Trusted Advisor Today!

Barkwell
WEALTH & ESTATE

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Justwealth

TOP 50 FINTECH COMPANIES

LEADING PORTFOLIO MANAGERS

2019 WEALTH PROFESSIONAL AWARDS FINALIST

James Gauthier CFA, Chief Investment Officer
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