

Justwealth: The “A,B,Cs”



justwealth.com/jackie-porter

**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 managed **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!



Investment Questionnaire

Complete an Investment Questionnaire that captures your goals and risk tolerance



Personal Information

Complete a Personal Information Worksheet to tell us about yourself



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.

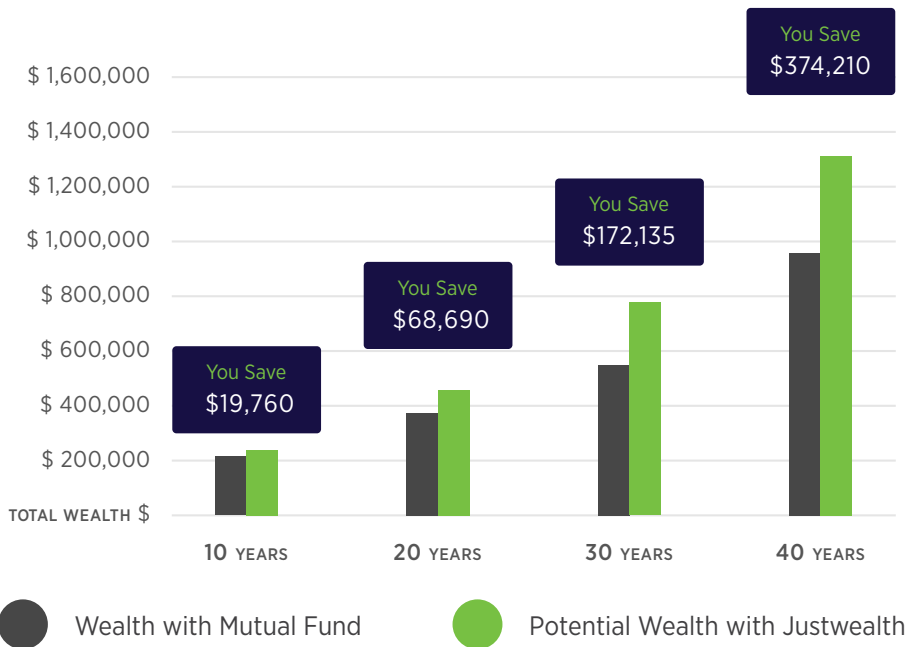
C. Our Offer to You: Low-cost, sophisticated investing.

Discounted Justwealth Management Fee: 0.40%	+	Justwealth Total Fee: 1.10%*
Jackie Porter Advisor Referral Fee: 0.50%	+	
Typical Justwealth Portfolio Cost: 0.20%		
Typical Mutual Fund Fee: 2.20%**		

*Source: Justwealth. Includes Justwealth Management Fee (0.40%) + Jackie Porter 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 1.10%
Extra Fees on
\$100,000**



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/jackie-porter

Contact Your
Trusted Advisor
Today!



Jackie Porter CFP

Award Winning Financial Planner

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Carte
WEALTH MANAGEMENT INC.
RISK MANAGEMENT INC.

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