

Justwealth: The “A,B,Cs”



justwealth.com/secureplan

**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

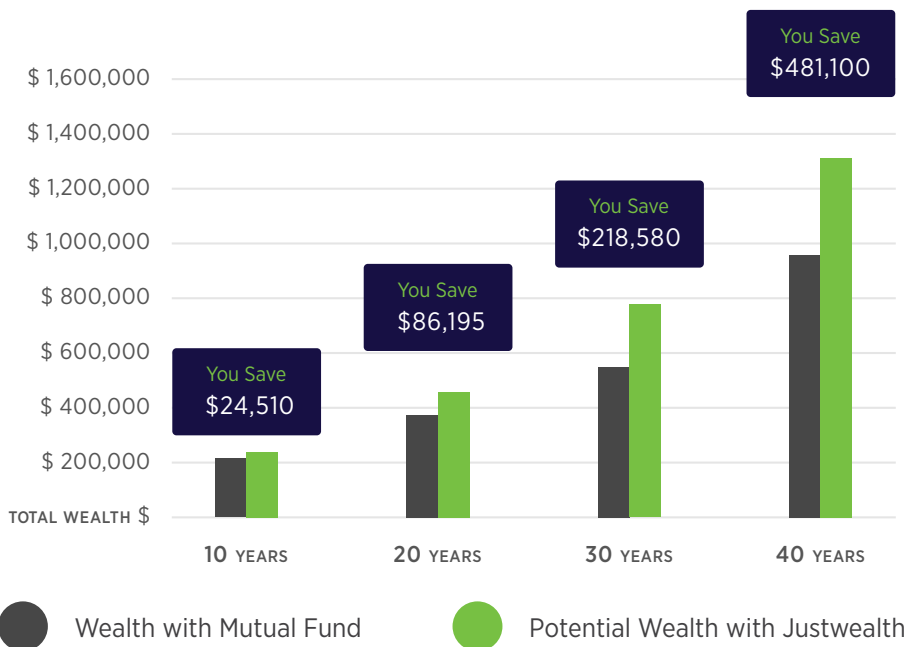
*Wealth Professional Canada, 2019. James Gauthier, Chief Investment Officer, Justwealth.

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

| | | | |
|---------------------------------------|--------------|---|---|
| Discounted Justwealth Management Fee: | 0.40% | + | Justwealth Total Fee: 0.85%* |
| SecurePlan Advisor Referral Fee: | 0.25% | | |
| Typical Justwealth Portfolio Cost: | 0.20% | | |
| | | | Typical Mutual Fund Fee: 2.20%** |

*Source: Justwealth. Includes Justwealth Management Fee (0.40%) + SecurePlan Advisor Referral Fee (0.25%) + Typical Justwealth Portfolio MER (0.20%) resulting in an all-in fee of 0.85%.
 **Source: Investor Economics and Strategic Insight: The Investment Funds Institute of Canada May 2015.

**Impact of 1.35%
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/secureplan

Contact Your
Trusted Advisor
Today!



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