

# Justwealth: The “A,B,Cs”



[justwealth.com/wright-wealth](https://justwealth.com/wright-wealth)

*\*One of Canada's Leading Portfolio Managers*

**A. Who is Justwealth:** An innovative online portfolio manager “aka” robo-advisor.

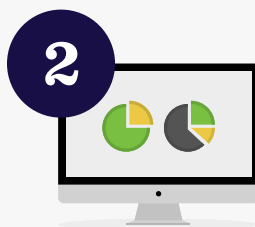
- ✓ Justwealth’s mission is to bring **justice** to **overcharged** and **underserved** Canadian investors
- ✓ Justwealth was launched in 2016 and is registered in all 10 Canadian provinces
- ✓ Justwealth’s seasoned management team averages 15+ years industry experience and has managed **tens of billions** 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

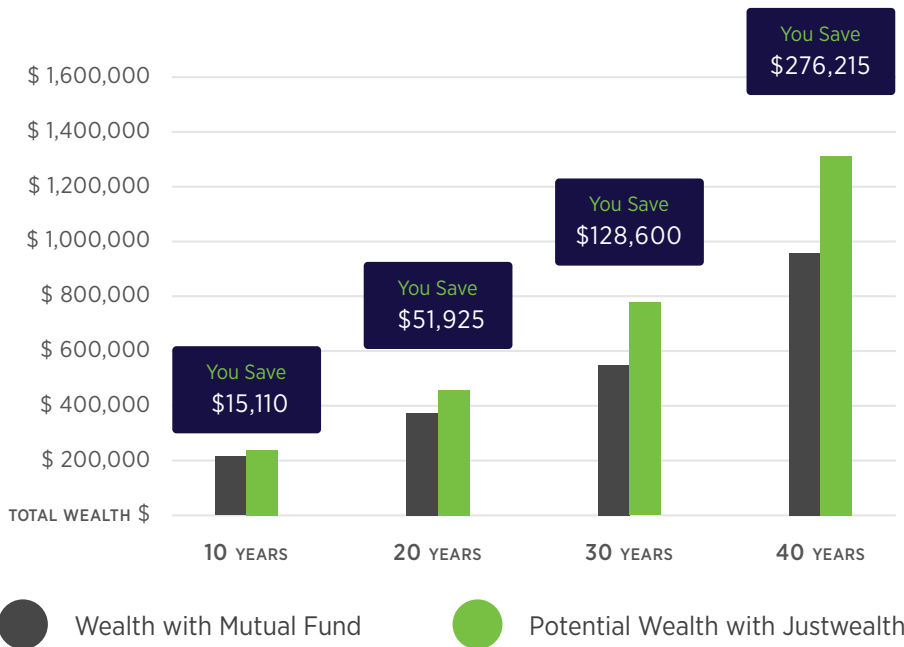
\*Wealth Professional Canada, 2019. James Gauthier, Chief Investment Officer, Justwealth.

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



\*Source: Justwealth. Includes Justwealth Management Fee (0.40%) + Wright Wealth Referral Fee (0.75%) + Typical Justwealth Portfolio MER (0.20%) resulting in an all-in fee of 1.35%.  
 \*\*Source: Investor Economics and Strategic Insight: The Investment Funds Institute of Canada May 2015.

**Impact of 0.85 %  
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/wright-wealth](http://justwealth.com/wright-wealth)

Contact Your  
Trusted Advisor  
Today!



Trevor Wright CHS, RWM  
Insurance & Investment Advisor  
Wright Wealth  
877. 242. 9116  
trevor@wrightwealth.ca



James Gauthier CFA, Chief Investment Officer  
Justwealth Financial Inc.