

Justwealth: The “A,B,Cs”



justwealth.com/wellplanned

**One of Canada's Top 50 Fintech Companies*

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

*Digital Finance Institute, 2019

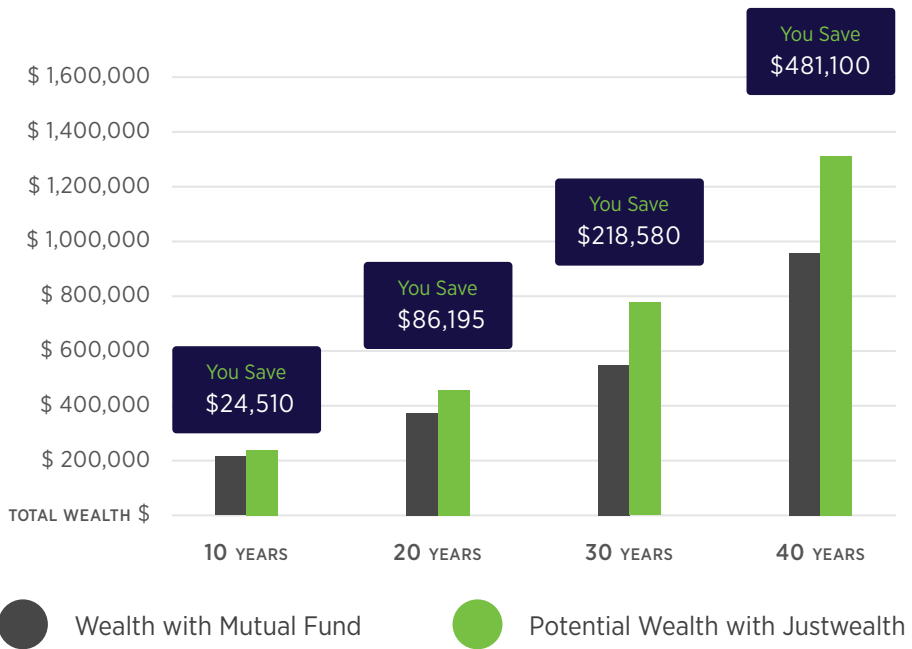
C. Our Offer to You: Low-cost, sophisticated investing.

Discounted Justwealth Management Fee:	0.40%	+	Justwealth Total Fee: 0.85%*
Well Planned Financial Referral Fee:	0.25%		
Typical Justwealth Portfolio Cost:	0.20%		
			Typical Mutual Fund Fee: 2.20%**

*Source: Justwealth. Includes Justwealth Management Fee (0.40%) + Mike Schutz - Well Planned Financial (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/wellplanned

Contact Your
Trusted Advisor
Today!



Mike Schutz CPA, CMA

Well Planned Financial

p: 778. 874. 5117

mike@wellplanned.ca



James Gauthier CFA, Chief Investment Officer
Justwealth Financial Inc.