Justwealth: The "A,B,Cs"

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 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
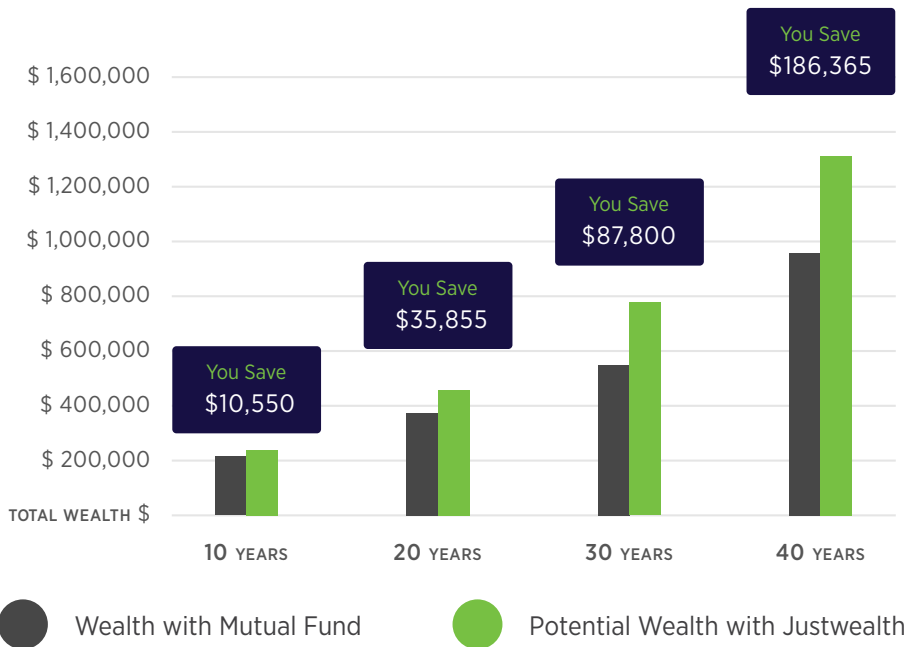
Digital Finance Institute, 2019

✔️ Justwealth

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

Discounted Justwealth Management Fee:	**0.40%**
+	
Pacific Choice Financial Referral Fee:	**1.00%**
+	
Typical Justwealth Portfolio Cost:	**0.20%**

Justwealth Total Fee:	**1.60%***
Typical Mutual Fund Fee:	**2.20%****

*Source: Justwealth. Includes Justwealth Management Fee (0.40%) + Marc Lapierre - Pacific Choice Financial Referral Fee (1.00%) + Typical Justwealth Portfolio MER (0.20%) resulting in an all-in fee of 1.60%.
**Source: Investor Economics and Strategic Insight: The Investment Funds Institute of Canada May 2015.

Impact of 0.60% Extra Fees on $100,000

You Save $186,365
You Save $87,800
You Save $35,855
You Save $10,550

$ 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/pacificchoice

Contact Your Trusted Advisor Today!

PACIFIC CHOICE FINANCIAL

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✔ Justwealth

WP Awards 2020
LEADING PORTFOLIO MANAGERS
TOP 50 FINTECH COMPANIES

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