

# Fusebill Group Savings Plan Member Handout

GroupBenefitz + fusebill + Justwealth

**Justwealth Financial Inc.** is an innovative online portfolio manager providing investment management services across Canada.

**Fusebill has made a Justwealth digital Group Savings Plan available to you:**

## Fusebill Group Savings Plan Overview

**Account Type(s)** RRSPs

**Contributions** **Employee Contributions:** Voluntary. Opt-in via online enrolment form  
**Employer Contributions:** Matching. Fusebill will match employee contributions dollar-for-dollar up to 4% of annual basic salary

**Employee Enrollment**

To complete enrollment into your plan:

*Step 1: Please complete the online form: [Enrollment Form](#)*

*Step 2: Sign-up for your Justwealth account (see instructions pg.3)*

### Starting with Justwealth is as easy as 1-2-3



#### Investment Questionnaire

Complete our online Investment Questionnaire that captures your goals and risk tolerance



#### Personal Information

Complete our online Personal Information Worksheet to tell us about yourself



#### Investment & Monitoring

Meet your Personal Portfolio Manager, finalize your portfolio(s), and you're all set!

Fusebill employees can open their accounts quickly and easily at [www.justwealth.com/fusebill](http://www.justwealth.com/fusebill)

**Justwealth offers a number of features to better service Group Savings Plan members:**

✓	
<b>Investment selection</b>	Automated process recommends a diversified portfolio for you
<b>Investment support</b>	Direct access to a registered Personal Portfolio Manager and support team
<b>Investment rebalancing</b>	Automatic
<b>Other investments</b>	Members can make additional contributions at any time using our online forms
<b>Portability</b>	Seamless transition when leaving Group plan
<b>Fees</b>	Low, simple and transparent
<b>Fiduciary Responsibility</b>	As a registered Portfolio Manager Justwealth has a duty to act in your best interest

## Fees Matter:

**Justwealth  
Total Fee: 1.10%<sup>2</sup>**

**Typical Mutual  
Fund Fee: 2.00%<sup>3</sup>**

**Fee Savings  
with  
Justwealth:  
0.90%**

### Illustrative Impact of Fee Savings on \$30,000 Investment with Justwealth<sup>1</sup>



Wealth with Mutual Fund
  Potential Wealth with Justwealth

1. Assumes an investment of \$30,000 with annual contributions of \$5,000. Savings reflect rounding.  
 2. Justwealth Total Fee includes discounted management fee of 0.40% + Advisor Referral Fee of 0.50% + average portfolio MER of 0.20% for Total Fee of 1.10%.  
 3. Typical Mutual Fund Fee based on industry data including Investor Economics & Strategic Insight; The Investment Funds Institute of Canada.

To sign up, please visit [www.justwealth.com/fusebill](http://www.justwealth.com/fusebill)

# How to Sign-Up for Your Justwealth Group Account

[www.justwealth.com/fusebill](http://www.justwealth.com/fusebill)

- ✔ Go to: <https://justwealth.typeform.com/fusebill> and complete plan enrollment form (~1 minute)
- ✔ Go to [www.justwealth.com/fusebill](http://www.justwealth.com/fusebill)
- ✔ Click on the "Get Started" icon
- ✔ Begin the process by creating a username and password
- ✔ Begin the Investment Questionnaire and select an RRSP Account
- ✔ Complete the online Investment Questionnaire (*approximately 12 questions*)
- ✔ Next, complete the online Personal Information Worksheet
- ✔ Follow the instructions to e-sign your application, upload your photo ID and click "Complete"
- ✔ Your Justwealth Personal Portfolio Manager & Support Team will contact you and complete your account opening!

**Get Started at:** [www.justwealth.com/fusebill](http://www.justwealth.com/fusebill)



## Prefer to set up your account over the phone?

Set a time for one of our knowledgeable representatives to call you and help activate your Justwealth investment account

**Click Here: Book A Time**

# Justwealth has earned a number of awards & nominations recognizing us as an industry leader:



Portfolio/ Discretionary Manager of the Year  
Nomination - James Gauthier - Justwealth  
WP Awards 2020



Portfolio/ Discretionary Manager of the Year  
Nomination - James Gauthier - Justwealth  
WP Awards 2020



FinTech Company of the Year  
Nomination - Justwealth  
Canadian FinTech & AI Awards



Canada's Top 50 FinTech Companies  
Digital Finance Institute 2019



Portfolio/ Discretionary Manager of the Year  
Nomination - James Gauthier - Justwealth WP  
Awards 2019



Leading Portfolio Managers  
James Gauthier - Justwealth  
WP Wealth Professional 2019

Get Started at: [www.justwealth.com/fusebill](http://www.justwealth.com/fusebill)

