

# Justwealth: The “A,B,Cs”

**\*Overall Best Robo-Advisor for Canadians**



[justwealth.com/wpftax](https://justwealth.com/wpftax)

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

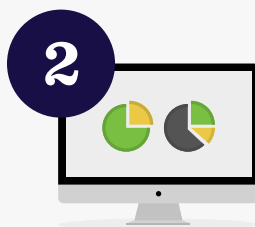
- ✔ Justwealth’s mission is to bring **justice** to **overcharged** and **underserved** Canadian investors
- ✔ Justwealth was launched in 2016 and is registered in all 10 Canadian provinces
- ✔ Justwealth’s seasoned management team averages 15+ years industry experience and has managed **tens of billions** of dollars
- ✔ Justwealth’s **70+ 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

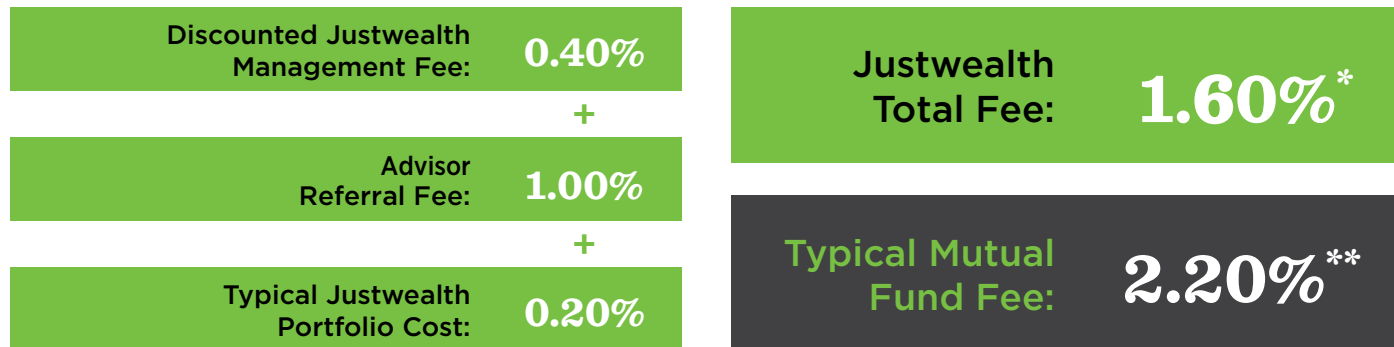


### Investment & Monitoring

Our sophisticated selection tool recommends your portfolio and your Personal Portfolio Manager implements your investment strategy

\*MoneySense: "a guide to the best robo-advisors in Canada for 2022"

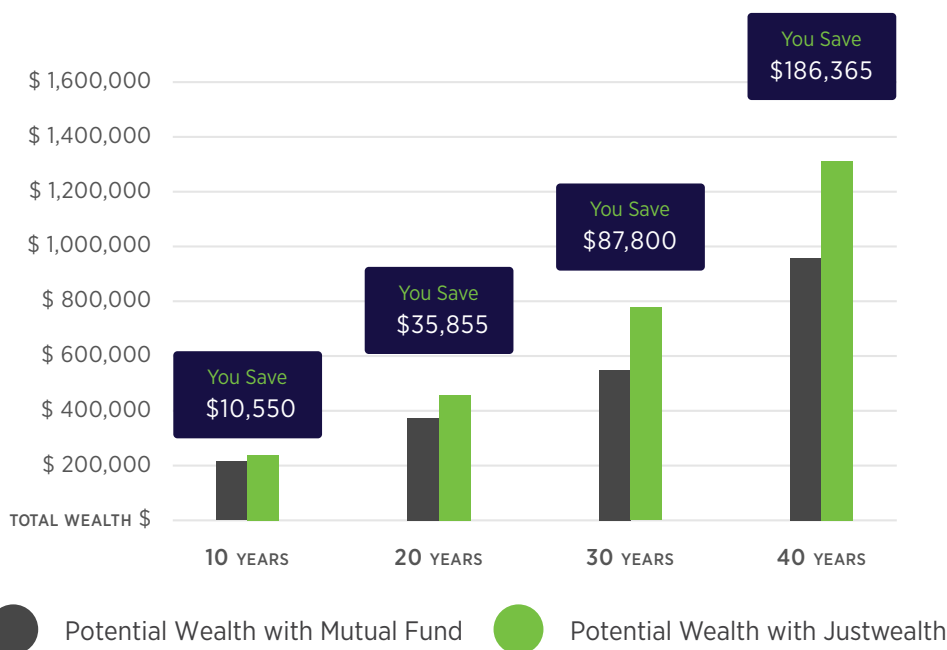
## C. Our Offer to You: Low-cost, sophisticated investing.



\*Source: Justwealth. Includes Justwealth Management Fee (0.40%) + Advisor 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



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/wpftax](https://justwealth.com/wpftax)

Contact Your  
Trusted Advisor  
Today!



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 **Justwealth**



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