# Justwealth: The "A,B,Cs"



\*Overall Best Robo-Advisor for Canadians

justwealth.com/brightstart

### A. Who is Justwealth: An innovative online portfolio manager "aka" robo-advisor.

- Sustwealth's mission is to bring **justice** to **overcharged** and **underserved** Canadian investors
- Sustwealth was launched in 2016 and is registered in all 10 Canadian provinces
- Sustwealth's seasoned management team averages 15+ years industry experience and has managed tens of billions of dollars
- Sustwealth's **70+ innovative portfolios** include Tax-Efficient portfolios for non-registered accounts and Target Date RESPs
- Simpact 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** 

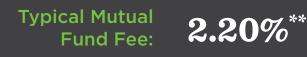
Our sophisticated selection tool recommends your portfolio and your Personal Portfolio Manager implements your investment strategy

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



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

Justwealth Total Fee: **1.60%**\*



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



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/brightstart

Contact Your Trusted Advisor Today!



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