

# Justwealth: The “A,B,Cs”

FORBES + COMPANY

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

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

**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.

**Justwealth  
Total Fee:**

**~0.60%\***

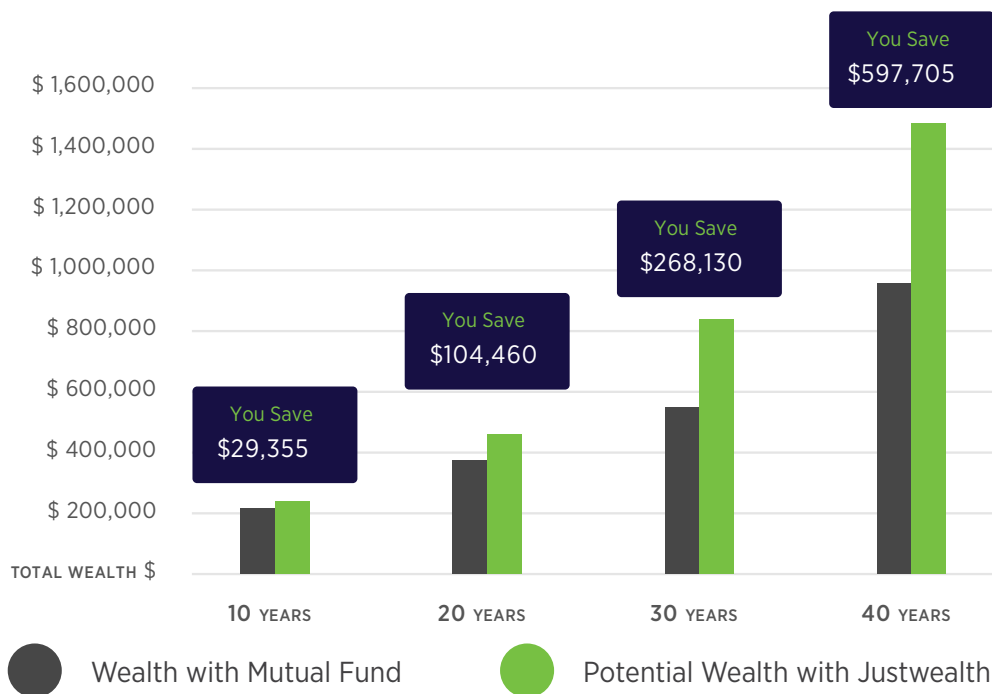
**Typical Mutual  
Fund Fee:**

**2.20%\*\***

\*Source: Justwealth. Includes Justwealth Management Fee (0.40%) + Typical Justwealth Portfolio MER (-0.20%) resulting in an all-in fee of ~0.60%.

\*\*Source: Investor Economics and Strategic Insight: The Investment Funds Institute of Canada May 2015.

**Impact of  
1.60%  
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/forbes](https://justwealth.com/forbes)**

**Contact Your  
Trusted Advisor  
Today!**

**Penny Forbes** CA, CFP, CPA

*Fee-Only Certified Financial Planner +  
Money Coach*

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**YOUR WEALTH, YOU'RE WORTH IT.**

 **Justwealth**

**WP** 2022  
*Awards*

**LEADING  
PORTFOLIO  
MANAGERS**

James Gauthier CFA, Chief Investment Officer  
Justwealth Financial Inc.