# Justwealth: The "A,B,Cs"



justwealth.com/zamosny

\*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"



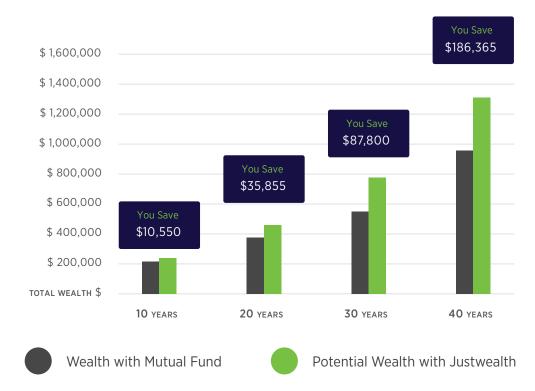
#### C. Our Offer to You: Low-cost, sophisticated investing.

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

**Typical Mutual** 2.20%\*\* Fund Fee:

\*Source: Justwealth. Includes Justwealth Management Fee (0.40%) + Bradley Zamosny Referral Fee (1.00%) + Typical Justwealth Portfolio MER (0.20%) resulting in an all-in fee of 1.60%.

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/zamosny



### **Bradley Zamosny**

Financial Advisor

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