

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
Total Fee: 1.60%***

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

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

**Impact of
0.60%
Extra Fees
on
\$100,000**



● Wealth with Mutual Fund ● Potential Wealth with Justwealth

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
Fortress Financial Group

p: 306.222.6535

e: brad@fortressfinancialgroup.ca



James Gauthier CFA, Chief Investment Officer
Justwealth Financial Inc.