

Justwealth: The “A,B,Cs”

Optimal Portfolios Inc.



justwealth.com/optimal

***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:**

1.20%*

**Typical Mutual
Fund Fee:**

2.20%**

*Source: Justwealth. Includes Justwealth Management Fee (0.40%) + Optimal Portfolios Inc. Referral Fee (0.60%) + Typical Justwealth Portfolio MER (0.20%) resulting in an all-in fee of 1.20%.

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

**Impact of
1.00%
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/optimal

Optimal Portfolios Inc.

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Justwealth

WP Awards 2022

**LEADING
PORTFOLIO
MANAGERS**

James Gauthier CFA, Chief Investment Officer
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