

Justwealth: The “A,B,Cs”



FAMILY
WEALTH
PROTECTION


justwealth.com/familywealth

***Best Overall Robo-Advisor**

A. Who is Justwealth: An innovative online portfolio manager “aka” robo-advisor.

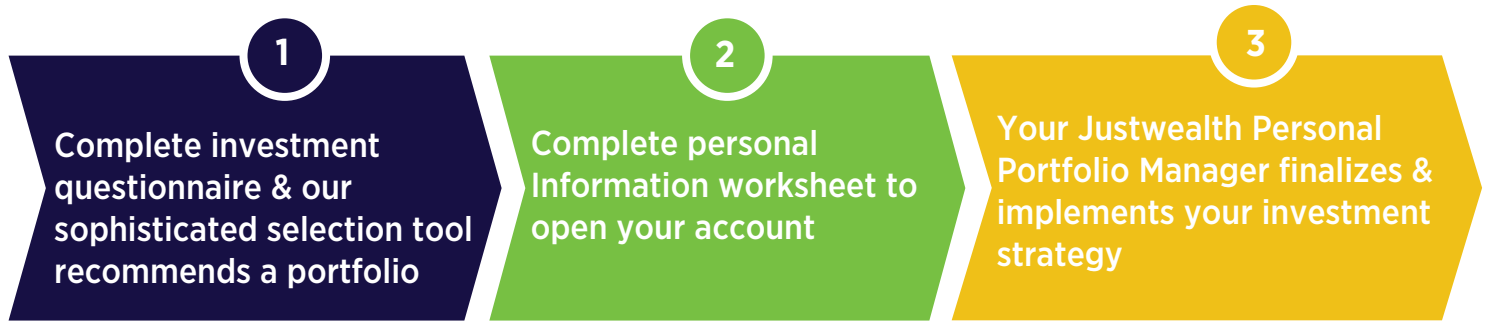
- ✔ Justwealth’s mission is to bring **justice** to **overcharged** and **underserved** Canadian investors
- ✔ Justwealth was launched in 2016 and is registered in all 10 Canadian provinces
- ✔ Justwealth’s seasoned management team averages 15+ years industry experience and has managed **tens of billions** 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

Our versatile and robust suite of ETF portfolios allows us to service a wide breadth of investor needs

	 Justwealth ^{**}
Average Client Size	~\$100,000
Range of Client Sizes	\$5,000 to \$10 Million +
Average Number of Client Accounts	~2 per Client
Average Client Age	~45 Years Old
Range of Client Ages	18 to 80+ years Old
Key Account Types	FHSA, LIF, LIRA, RESP, RRIF, RRSP, Spousal RRSP, TFSA, Non-Registered
Client Geography	Across Canada (<i>all 10 provinces</i>)

*Moneysense.ca, Feb. 8, 2024 - "Best robo-advisors in Canada for 2024"
**As of June 30th, 2024.

B. How Does it Work: Convenient and easy online sign-up!



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

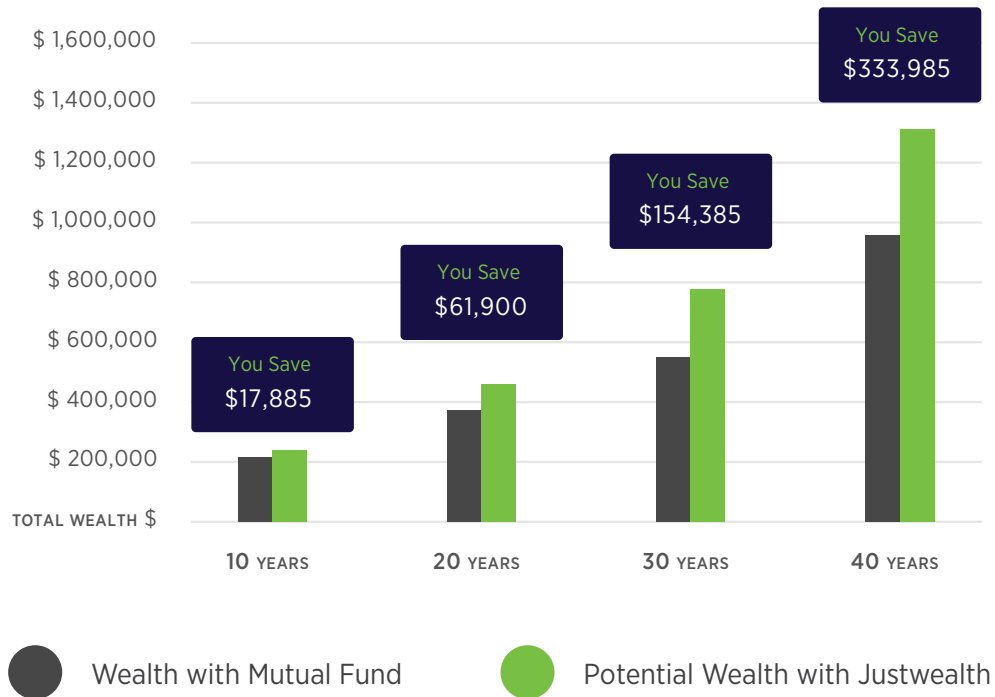
**Justwealth
Total Fee: 1.20%***

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

*Source: Justwealth. Includes Justwealth Management Fee (0.40%) + Family Wealth Protection 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**



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/familywealth

**Contact Your
Trusted Advisor
Today!**

Leslie Gottlieb

Senior Financial Advisor

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Protecting Canadian families for over 25 years

 **Justwealth**



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