

# Justwealth: The “A,B,Cs”



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

*\*Best Overall Robo-Advisor*

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

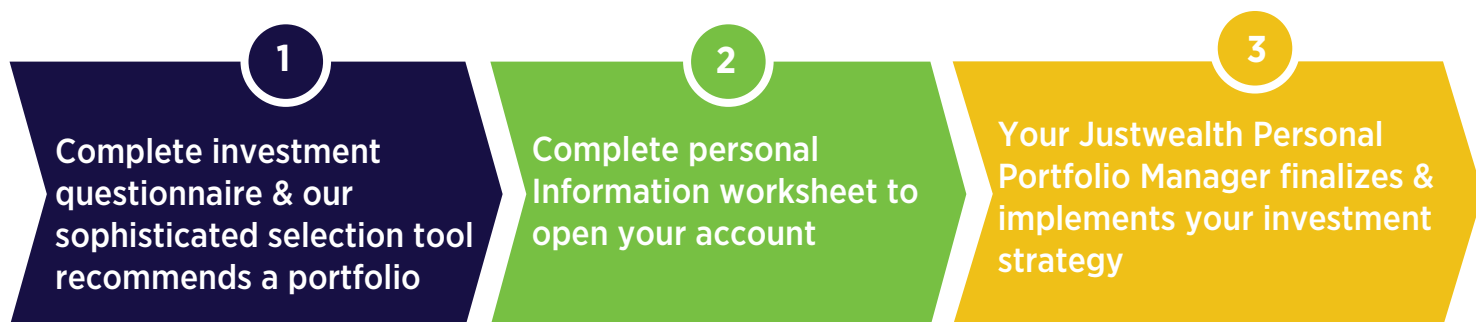
- ✔ Justwealth’s mission is to bring **justice** to **overcharged** and **underserved** Canadian investors
- ✔ Justwealth was launched in 2016 and is registered in all 10 Canadian provinces
- ✔ Justwealth’s seasoned management team averages 20+ years industry experience and has managed **tens of billions** 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

	
Average Client Size	>\$125,000
Range of Client Sizes	\$5,000 to \$1 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 (all 10 provinces)

\*Moneysense.ca, Feb. 13, 2025: “Best robo-advisors in Canada for 2025”  
\*\*As of December 31st, 2024.

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



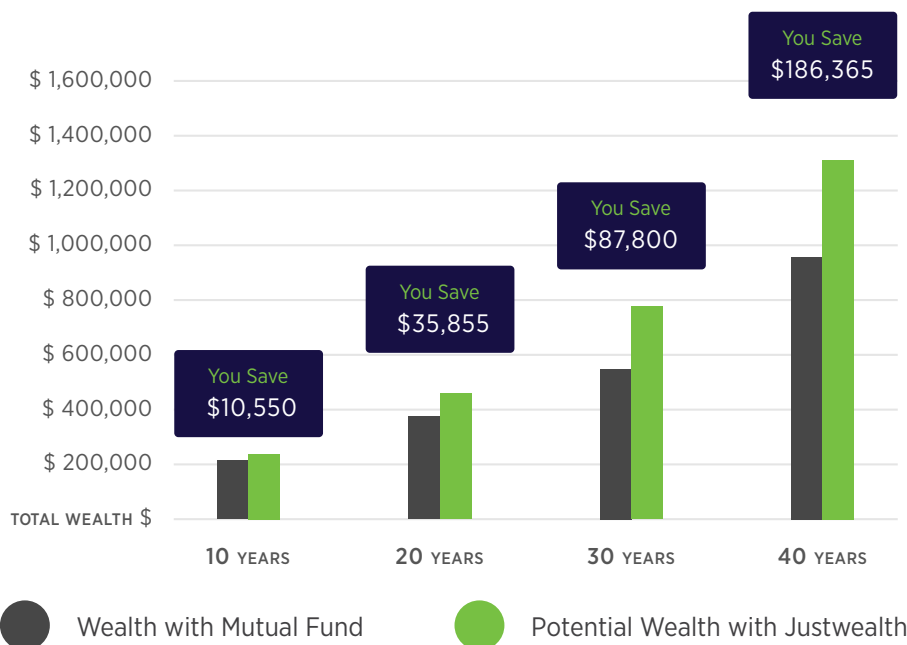
## C. Our Offer to You: Low-cost, sophisticated investing.

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

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

\*Source: Justwealth. Includes Justwealth Management Fee (0.40%) + Designed Securities Ltd (Fortress Financial) 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.

**Illustrative  
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/fortressfinancial](https://justwealth.com/fortressfinancial)**

**Contact Your  
Trusted Advisor  
Today!**

**Jason Forrest**

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 **Justwealth**