

Justwealth: The "ABCs"

**Best Overall Robo-Advisor*



justwealth.com/aaronlalande

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 and the Yukon Territories
- ✔ Justwealth's seasoned management team averages 20+ years industry experience and has managed **tens of billions** of dollars
- ✔ Justwealth's **80+ innovative portfolios** include Growth portfolios, Income portfolios, ESG, US\$ and Tax-Efficient portfolios
- ✔ **Impact on the Client:** Justwealth has more options to properly align your investment objectives with our portfolios

Versatile and robust suite of ETF portfolios allows Justwealth to service a wide breadth of investor needs

| |  |
|-----------------------------------|--|
| Average Client Size | > \$125,000 |
| Range of Client Size | \$5,000 - \$10 Million+ |
| Average Number of Client Accounts | ~2 per client |
| Average Client Age | ~45 Years Old |
| Range of Client Ages | 18 - 80+ years old |
| Key Account Types | FHSA, RRSP/RRIF, TFSA, Non-Registered, LIF/LIRA, RESP/RDSP |
| Client Geography | Canada-wide <i>All 10 provinces + Yukon</i> |

*Moneysense.ca, Feb. 13, 2025: "Best robo-advisors in Canada for 2025"
**As of June 30th, 2025.

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



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

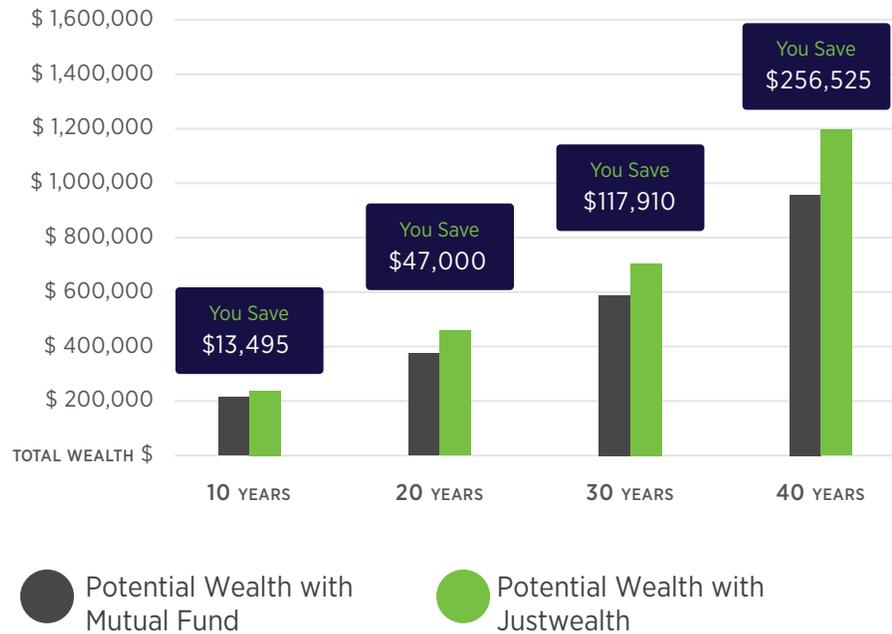
**Justwealth
Total Fee: 1.25%***

**Typical Mutual
Fund Fee: 2.00%****

*Source: Justwealth. Includes Justwealth Management Fee (0.40%) + Hub / Zavitz Referral Fee (0.65%) + Typical Justwealth Portfolio MER (0.20%) resulting in an all-in fee of 1.25%.

**Source: Ontario Securities Commission - <https://www.getsmarteraboutmoney.ca/learningpath/mutual-funds-segregated-funds/mutual-fund-fees/>

**Illustrative
Impact of
0.75%
Extra Fees
on a
\$100,000
Portfolio**



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/aaronlalande

**Contact Your
Trusted Advisor
Today!**

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