

# [24]7.ai Group Savings Plan Member Handout

**Justwealth Financial Inc.** is an innovative online portfolio manager providing investment management services across Canada.

[24]7.ai has made a Justwealth digital Group Savings Plan available to you:

## [24]7.ai Group Savings Plan Overview

**Account Type(s)** RRSP & TFSA accounts

**Employee Enrolment** To complete enrolment into your plan:  
*Step 1: Please complete the online form: [Enrolment Form](#)*  
*Step 2: Sign-up for your Justwealth account (see instructions pg.3)*

**Contributions** Employee: Voluntary contributions. Each employee will designate a percentage of salary to contribute to their RRSP and/or TFSA account(s)

All employee contributions are voluntary and will be taken directly from payroll based on the instructions provided during enrolment.

### Starting with Justwealth is as easy as 1-2-3



#### Investment Questionnaire

Complete our online Investment Questionnaire that captures your goals and risk tolerance



#### Personal Information

Complete our online Personal Information Worksheet to tell us about yourself



#### Investment & Monitoring

Meet your Personal Portfolio Manager, finalize your portfolio(s), and you're all set!

Employees can open their accounts quickly and easily at [www.justwealth.com/247ai](http://www.justwealth.com/247ai)

**Justwealth offers a number of features to better service Group Savings Plan members:**

✓	
<b>Investment selection</b>	Automated process recommends a diversified portfolio for you
<b>Investment support</b>	Direct access to a registered Personal Portfolio Manager and support team
<b>Investment rebalancing</b>	Automatic
<b>Other investments</b>	Members can make additional contributions at any time using our online forms
<b>Portability</b>	Seamless transition when leaving Group plan
<b>Fees</b>	Low, simple and transparent
<b>Fiduciary Responsibility</b>	As a registered Portfolio Manager Justwealth has a duty to act in your best interest

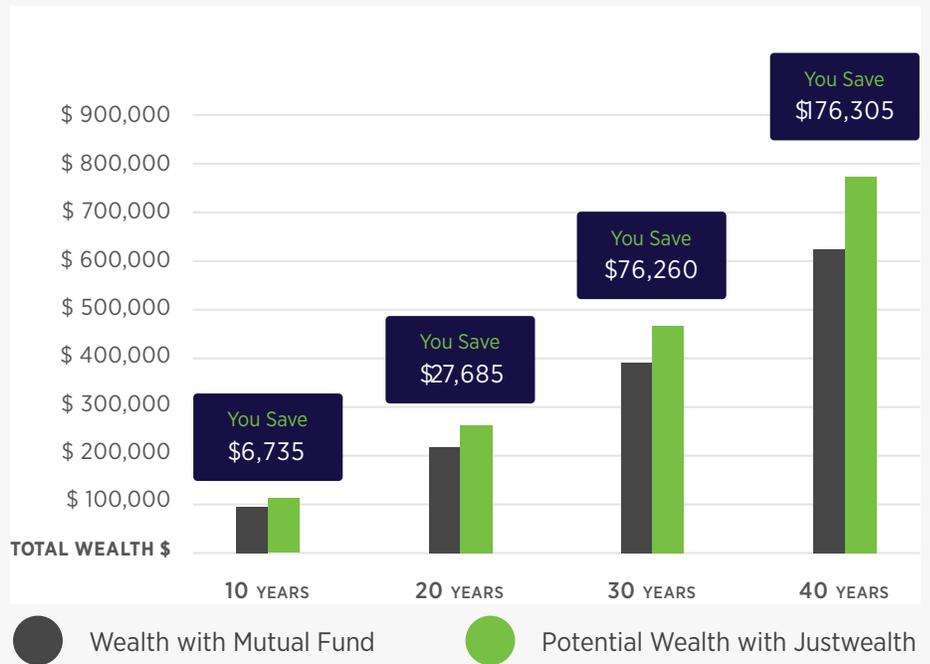
## Fees Matter:

**Justwealth  
Total Fee: 1.10%<sup>2</sup>**

**Typical Mutual  
Fund Fee: 2.00%<sup>3</sup>**

**Fee Savings  
with  
Justwealth:  
0.90%**

**Illustrative Impact of Fee Savings on \$30,000 Investment with Justwealth<sup>1</sup>**



1. Assumes an investment of \$30,000 with annual contributions of \$5,000. Savings reflect rounding.  
 2. Justwealth Total Fee includes discounted management fee of 0.40% + Advisor Referral Fee of 0.50% + average portfolio MER of 0.20% for Total Fee of 1.10%.  
 3. Typical Mutual Fund Fee based on industry data including Investor Economics & Strategic Insight; The Investment Funds Institute of Canada.

To sign up, please visit [www.justwealth.com/247ai](http://www.justwealth.com/247ai)

# How to Sign-Up for Your Justwealth Group Account

[www.justwealth.com/247ai](http://www.justwealth.com/247ai)

- ✓ Go to: <https://justwealth.typeform.com/247care> and complete plan enrolment form (*approximately 1-minute*)
- ✓ Go to [www.justwealth.com/247ai](http://www.justwealth.com/247ai)
- ✓ Click on the "Get Started" icon
- ✓ Begin the process by creating a username and password
- ✓ Begin the Investment Questionnaire and select an RRSP and/or a TFSA account(s)
- ✓ Complete the online Investment Questionnaire (*approximately 12 questions*)
- ✓ Next, complete the online Personal Information Worksheet
- ✓ Follow the instructions to e-sign and submit your application
- ✓ Your Justwealth Personal Portfolio Manager & Support Team will contact you and complete your account opening!

**Get Started at:** [www.justwealth.com/247ai](http://www.justwealth.com/247ai)

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✓ Justwealth