

# Justwealth: The “A,B,Cs”



**\*Best Overall Robo-Advisor**

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

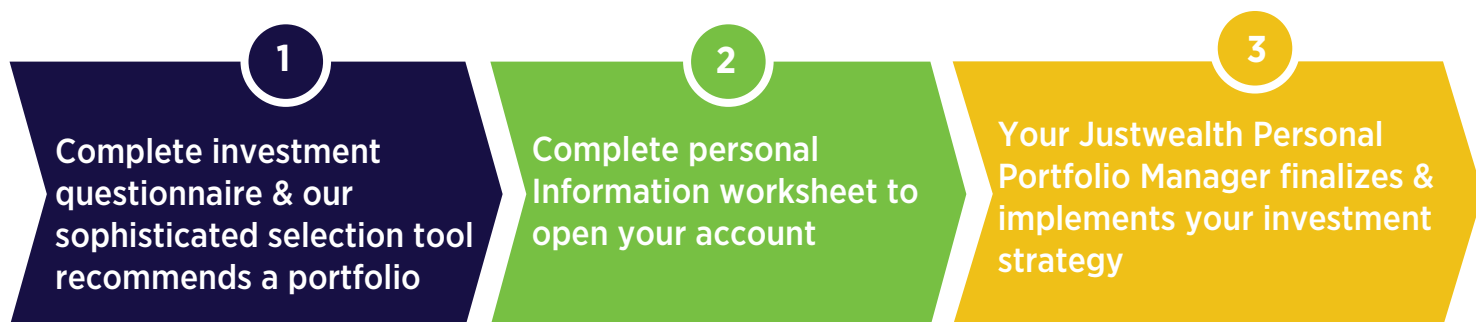
- ✔ Justwealth’s mission is to bring **justice** to **overcharged** and **underserved** Canadian investors
- ✔ Justwealth was launched in 2016 and is registered in all 10 Canadian provinces and the Yukon Territories
- ✔ Justwealth’s seasoned management team averages 20+ years industry experience and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

	✔ Justwealth **
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 All 10 provinces + Yukon

\*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.

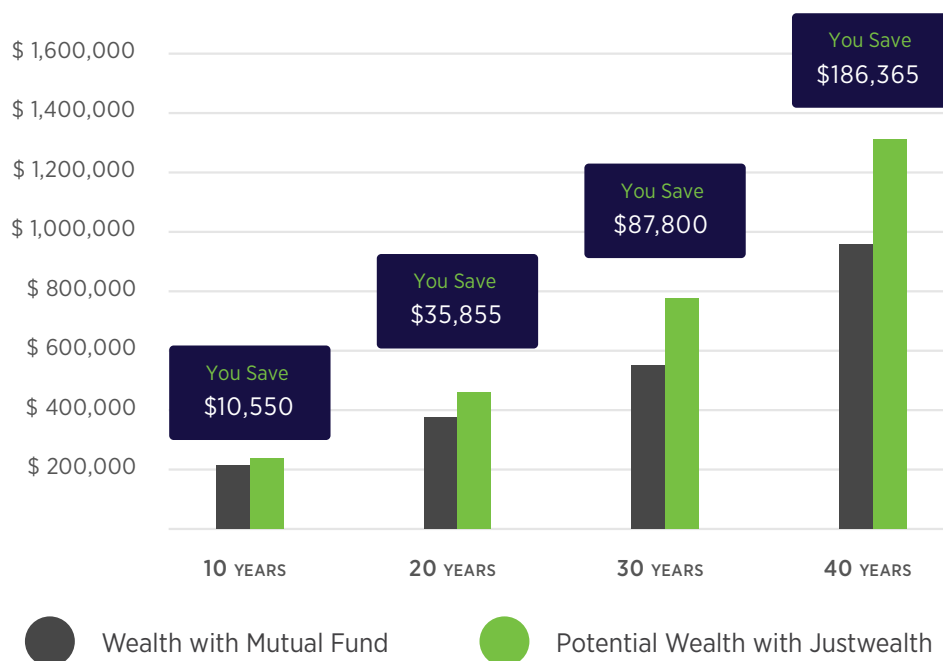
**Justwealth  
Total Fee:** **1.60%\***

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

\*Source: Justwealth. Includes Justwealth Management Fee (0.40%) + YourPlan Financial Referral Fee (1.00%) + Typical Justwealth Portfolio MER (0.20%) resulting in an all-in fee of 1.60%.

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

### Illustrative Impact of 0.40% 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/yourplan](https://justwealth.com/yourplan)**

**Contact Your  
Trusted Advisor  
Today!**

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