

# Justwealth: The "ABCs"

**\*Best Overall Robo-Advisor**



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

**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,<br>Non-Registered, LIF/LIRA,<br>RESP/RDSP |
| Client Geography                  | Canada-wide<br><i>All 10 provinces + Yukon</i>                   |

\*Moneysense.ca, Feb. 11, 2026: "Best robo-advisors in Canada for 2026"  
\*\*As of December 31st, 2025

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✓ Justwealth

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



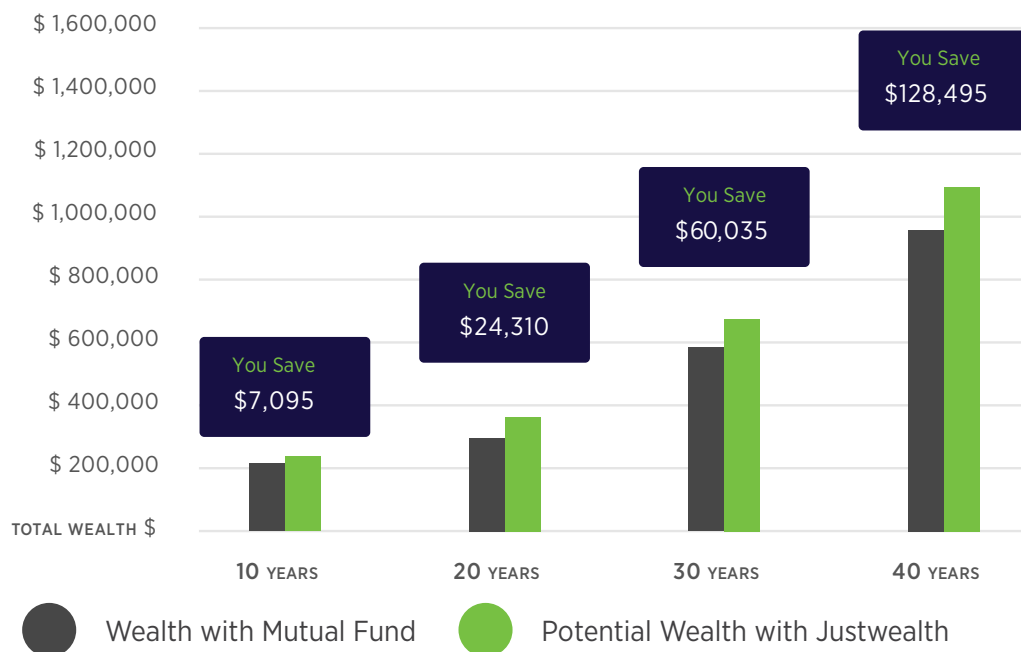
## C. Our Offer to You: Low-cost, sophisticated investing.

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

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

\*Source: Justwealth. Includes Justwealth Management Fee (0.40%) + Connolly Ventures and Gillrie Financial Strategies Referral Fee of 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/>

### Impact of 0.40% Extra Fees on \$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/connollygillrie](https://justwealth.com/connollygillrie)

Contact Your  
Trusted Advisor  
Today!

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