

# Group RRSPs

*Powered by Justwealth*

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

**Team Jackie Porter has made a Justwealth digital Group Savings Plan available to you.**

## Team Jackie Porter Group RRSP Plan Overview

<b>Accounts</b>	RRSPs
<b>Contributions</b>	<p><u>Employer</u>: Team Jackie Porter will contribute directly to each employee's Group RRSP account.</p> <p><u>Employee</u>: Employees can elect to contribute a monthly amount to their Justwealth accounts by completing this online form: <a href="#">typeform</a></p> <p><i>*Note: all employees must ensure that they contribute adequately to their account in order to reach an account balance of at least \$5,000 by the end of their first year in the plan.</i></p>
<b>Justwealth Account</b>	All employees <u>must</u> sign up for a Justwealth RRSP account by following the step-by-step instructions on Page 3
<b>Additional Accounts</b>	Employees are also free to sign up for additional non-Group RRSP accounts from Justwealth's full suite of account types.

### 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/TJP](http://www.justwealth.com/TJP)**

*Please see page 3 for step-by-step sign-up instructions.*

**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

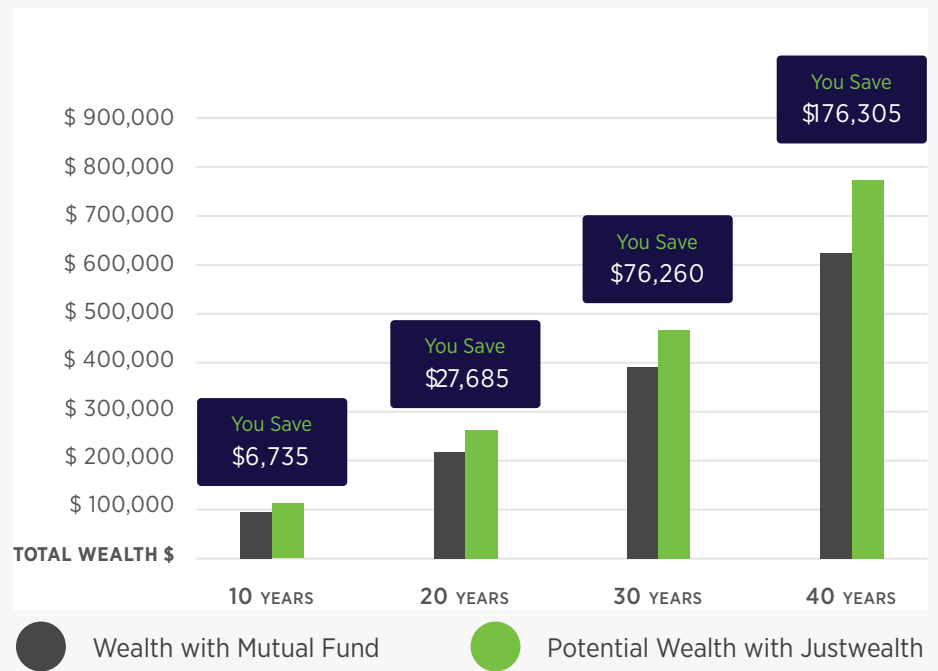
## Fees Matter:

**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 in a tax-free account with annual contributions of \$5,000 and an annual return of 6%. 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/TJP](http://www.justwealth.com/TJP)  
 Please see page 3 for step-by-step sign-up instructions.

# How to Sign-Up for Your Justwealth Group Account

[www.justwealth.com/TJP](http://www.justwealth.com/TJP)

- ✓ Go to [www.justwealth.com/TJP](http://www.justwealth.com/TJP)
- ✓ Scroll to Section 1 of your Team Jackie Porter company hub and click "Enroll Now". Spend 1-minute to complete our online enrollment form.
- ✓ Scroll to Section 2 of your Team Jackie Porter company hub and click "Get Started"
- ✓ Begin the process by creating a username and password
- ✓ Begin the Investment Questionnaire and select an RRSP
- ✓ Complete the online Investment Questionnaire (*approximately 12- questions*)
- ✓ Next, complete the online Personal Information Worksheet
- ✓ Follow the instructions to e-sign your application, upload your photo ID and click "Complete"
- ✓ Your Justwealth Personal Portfolio Manager & Support Team will contact you and complete your account opening!

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



**Prefer to set up your account over the phone?**

Set a time for one of our knowledgeable representatives to call you and help activate your Justwealth investment account

**Click Here: [Book A Time](#)**

# A Recognized Industry Leader

**THE GLOBE AND MAIL** 

For the third straight year, Justwealth had the highest five-year after-fee annualized total returns for the growth portfolio

*Globe and Mail, Nov 9, 2023 - Despite tough times, it's been a good year for those who use robo-advisors.*

## Five-Year After-Fee Annualized Total Returns for the Growth Portfolio

(for period ending Sept. 30, 2023)

Justwealth	5.98%
Qtrade Guided Portfolios	5.20%
Nest Wealth	5.03%
RBC InvestEase	4.86%
Questwealth	4.82%
Smart Money Invest	4.19%
Wealthsimple	3.80%

## MoneySense

"Best robo-advisor for a large sum to invest: Justwealth"

*Moneysense.ca, June 12, 2023 - A guide to the best robo-advisors in Canada for 2023.*



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



TEAM JACKIE PORTER

 Justwealth

[justwealth.com](http://justwealth.com)