





Justwealth Competitive Positioning

Justwealth has differentiated itself within the Canadian robo-advisor landscape by focusing on investment quality and high value-added service over commoditized and easily copied technology

							
Independent vs. Partnered	Independent	Power Financial Group	National Bank of Canada	Independent	Nicola Wealth Management	Independent	BMO
# of ETFs used	42	10	7	14	13	13	6
# of Portfolios	70	21	N/A	20	8	7	5
# of ETF providers used	9	4	3	3	5	4	1
Tax Efficient Portfolios	Yes	No	No	No	No	No	No
Target Date Portfolios	Yes	No	No	No	No	No	No
Financial Planning Offered	Yes	Yes (100K+)	No	No	Yes (online tool)	No	No
Transfers-in-Kind	Yes	Yes	No	Yes	Yes	No	No
Performance Data Available	Yes	Yes	No	Yes	Yes	Yes	Yes
Online Chat	Yes	No	Yes	Yes	Yes	No	Yes
Tax-Loss Harvesting	Yes	Yes (100K+)	No	Yes (\$150K+)	Yes	No	No

This information is obtained from sources that we believe to be reliable but may be subject to change without our knowledge.

Source: Justwealth, Wealthsimple, Nest Wealth, ModernAdvisor, Wealthbar, Invisor & BMO.