Contact us

virtualwealth.ca

604.622.4500
1.844.622.4500

info@virtualwealth.ca

Get started building your wealth

It takes only a few minutes to open an account

Tell us about yourself
Complete our simple goal-based questionnaire, then view your customized portfolio proposal.

Upload your documents
Confirm your ID and provide your e-signature.

Fund your account
Use electronic funds transfer or bill payment from your financial institution. Or, transfer in cash from another investment account. You can also set up automatic monthly contributions to ensure you save and invest regularly.

Open an account now at **virtualwealth.ca**

In the application, you will be asked if you were referred to VirtualWealth.

To ensure your financial institution is correctly associated with your account, please enter the following information:

Institution name: _____

Branch or region: _____

Representative name: _____

Qtrade

MIX
Paper from responsible sources
FSC® C014956

A smart, easy way to build wealth

Introducing digital advice from VirtualWealth™

virtualwealth™

You have choices

It's a great time to be an investor, with the range of choices available. VirtualWealth™ combines the convenience of online investing with the expertise of professional investment advice.

Invest your money, not your time

VirtualWealth is for people who want a simple, low-cost way to build wealth without spending time selecting, monitoring and rebalancing their investments.

With VirtualWealth you get expert management with low fees, to help you reach your financial goals.

Getting started online is quick and easy. Tell us a little about yourself, use our goal-based savings calculators and questionnaire to define your target, and decide how much to invest. We'll help you choose the investment portfolio that best matches your needs, your timeline, and your comfort zone for risk.

Then leave the rest to us. An experienced financial team monitors your investments, so you don't have to.

It's all in the mix

Investing success largely depends on asset allocation and diversification—holding a strategic mix of investments from different industries and economic regions. With VirtualWealth, your money is invested in Canadian, U.S. and global stocks and bonds, through the use of ETFs (exchange-traded funds). ETFs are low-cost, diversified and efficient investments for your portfolio.

Pay less, save more

With VirtualWealth, you pay a single low fee, based on a percentage of assets. Plus, for non-registered accounts, the fee is tax deductible. (Consult your tax specialist.) A lower fee allows you to keep more of your money invested, so you can save more and reach your investment goals faster. Check our website for the complete fee schedule.

Clear insights

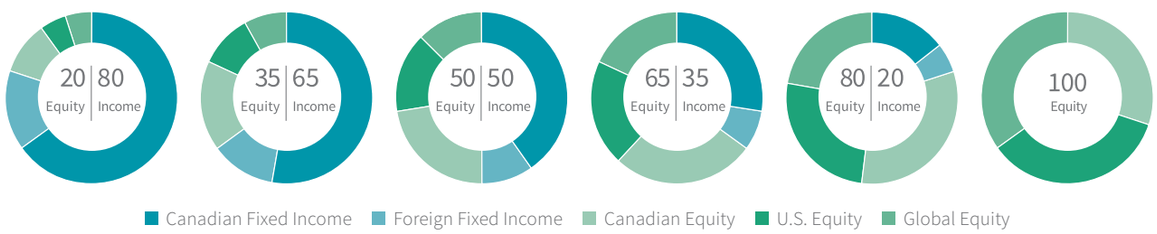
Straightforward account information is always available. You can track your progress, see all account activity, and update your personal information. When you have questions, knowledgeable support from a registered representative is available by phone or email.

Stay on track

It's important to know that your VirtualWealth portfolio is continuously monitored. If market forces shift your asset allocation, your portfolio is automatically rebalanced so it stays aligned with your personal target mix. This is an important part of our investing service which ensures you maintain your risk profile and stay on track.

What are the portfolio solutions?

There are six portfolio options, each comprising 5 to 9 ETFs.†



† The sample portfolios provided herein are provided for illustration purposes only and are not intended to provide, and should not be relied upon as providing, legal, accounting, tax, financial, investment or other advice, or a solicitation to buy or sell any securities.

About VirtualWealth

VirtualWealth is powered by Qtrade Financial Group ('Qtrade'), the team behind Qtrade Investor, Canada's top-ranked online brokerage (based on ratings by The Globe and Mail, MoneySense, and Surviscor) and OceanRock Investments Inc., one of Canada's fastest-growing investment fund managers and a recent Morningstar "Advisor's Choice" finalist.

Since its launch in 1999, Qtrade has earned a reputation for sophisticated yet easy-to-use technology, continuous innovation, investment management expertise, and outstanding client service.

Qtrade is backed by Desjardins Group, Canada's leading and the world's sixth largest cooperative financial group.