

Welcome Bonus - Our commitment to no investor fees!

At Lifelong Investments, we are here to help you maximize your returns by covering eligible third party fees invoiced by the Trust Provider, as long as:

- A minimum \$25,000 investment is maintained; and
- Lifelong Investments shares are the sole holding in the registered account.

Registered accounts (including RRSP, TFSA, LIRA, RESP, RPP, RRIF, FHSA, and LRSP) are serviced by Olympia Trust Company (the "Trust Provider").

What we cover:



Annual Trust Provider Account Fee

\$150/year + HST
(for 1st account)

\$75/year + HST for 2nd account
in investor's name.



Trust Provider Share Purchase Fee

\$75/purchase + HST
(minimum \$25,000 purchase)

Additional investment purchases are covered with a minimum \$5,000 investment.



Share Redemption Cost

\$0

Lifelong Investments does not cover Trust Provider Account Withdrawal Fees (\$75 reduction for partial withdrawals or \$250 reduction for full withdrawals).

In the year of account closure, the fee reimbursement is pro-rated based on the duration invested.

Disclaimer: Lifelong Investments reserves the right to adjust or terminate the fee policy at any time at its sole discretion, without written notice.