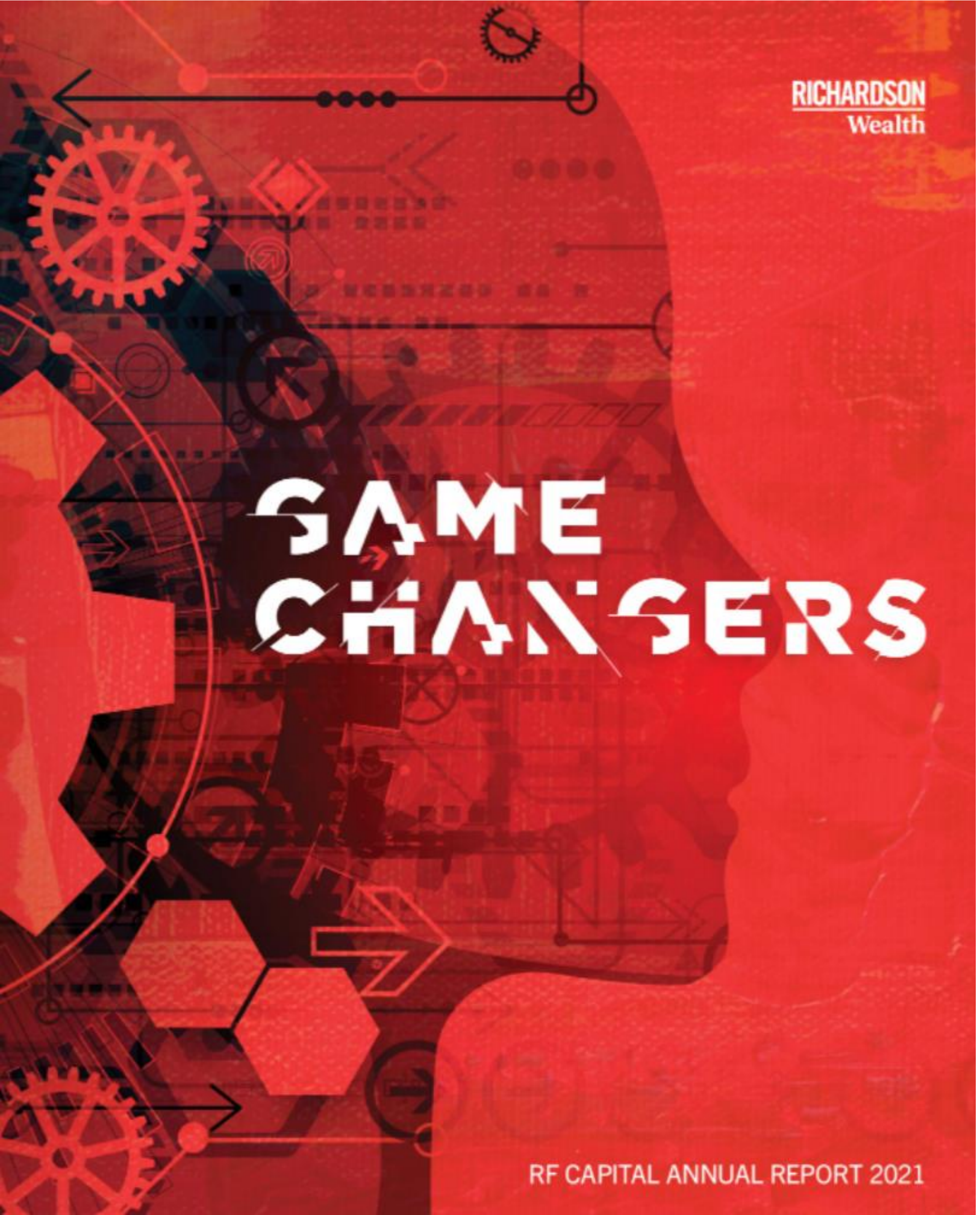
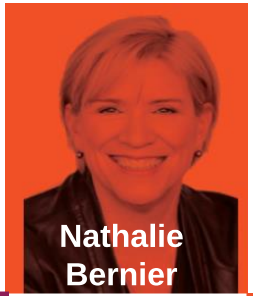


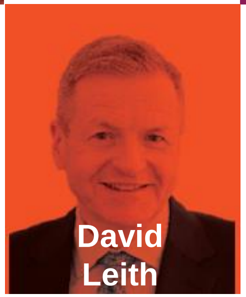
May 4, 2022

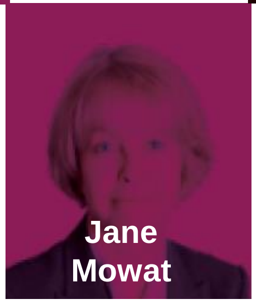
Annual General Meeting of Shareholders

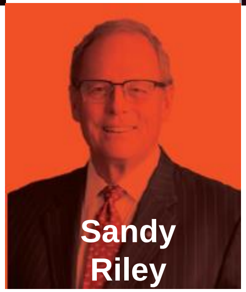
DONALD WRIGHT

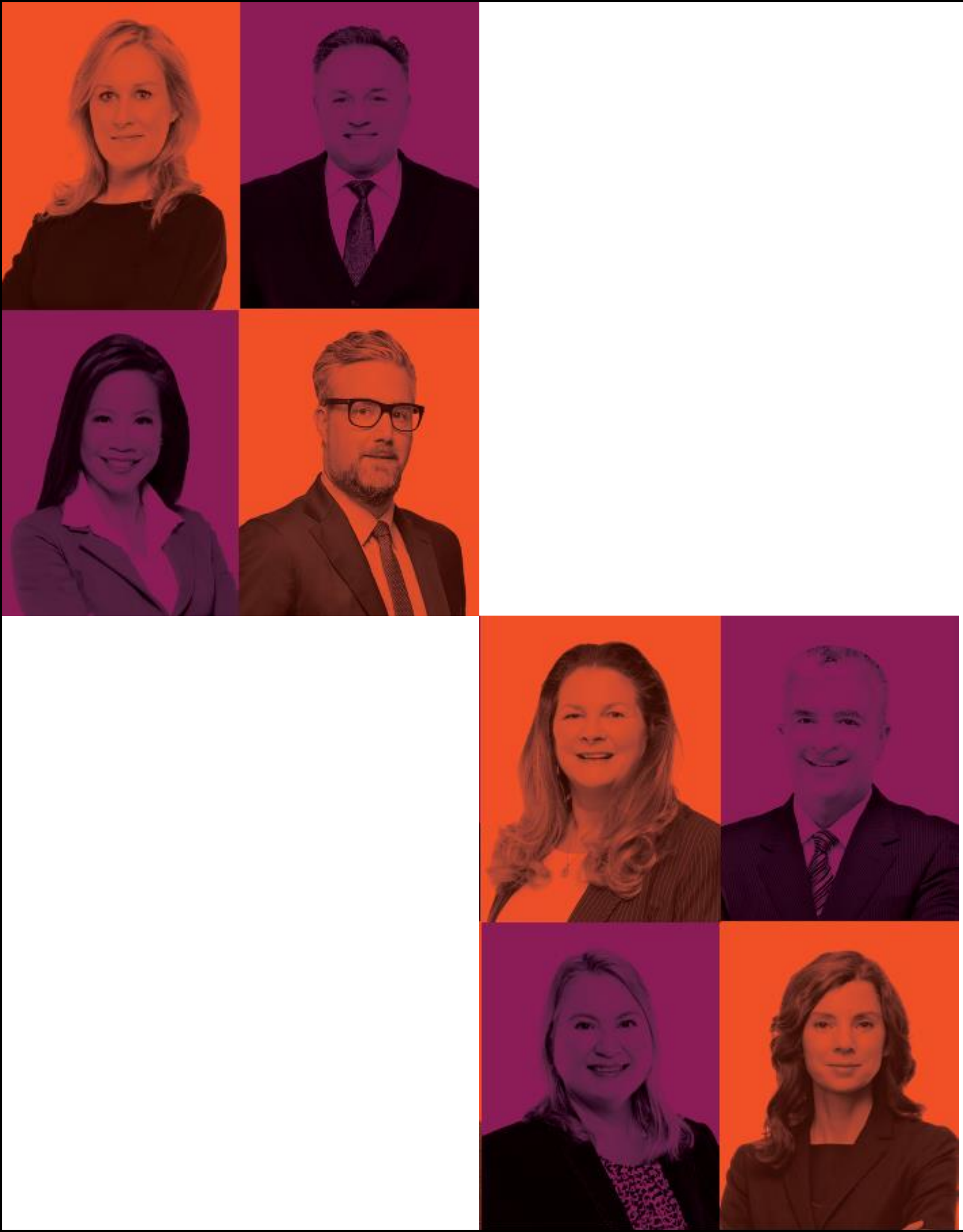
Chair











AGENDA

Appointments

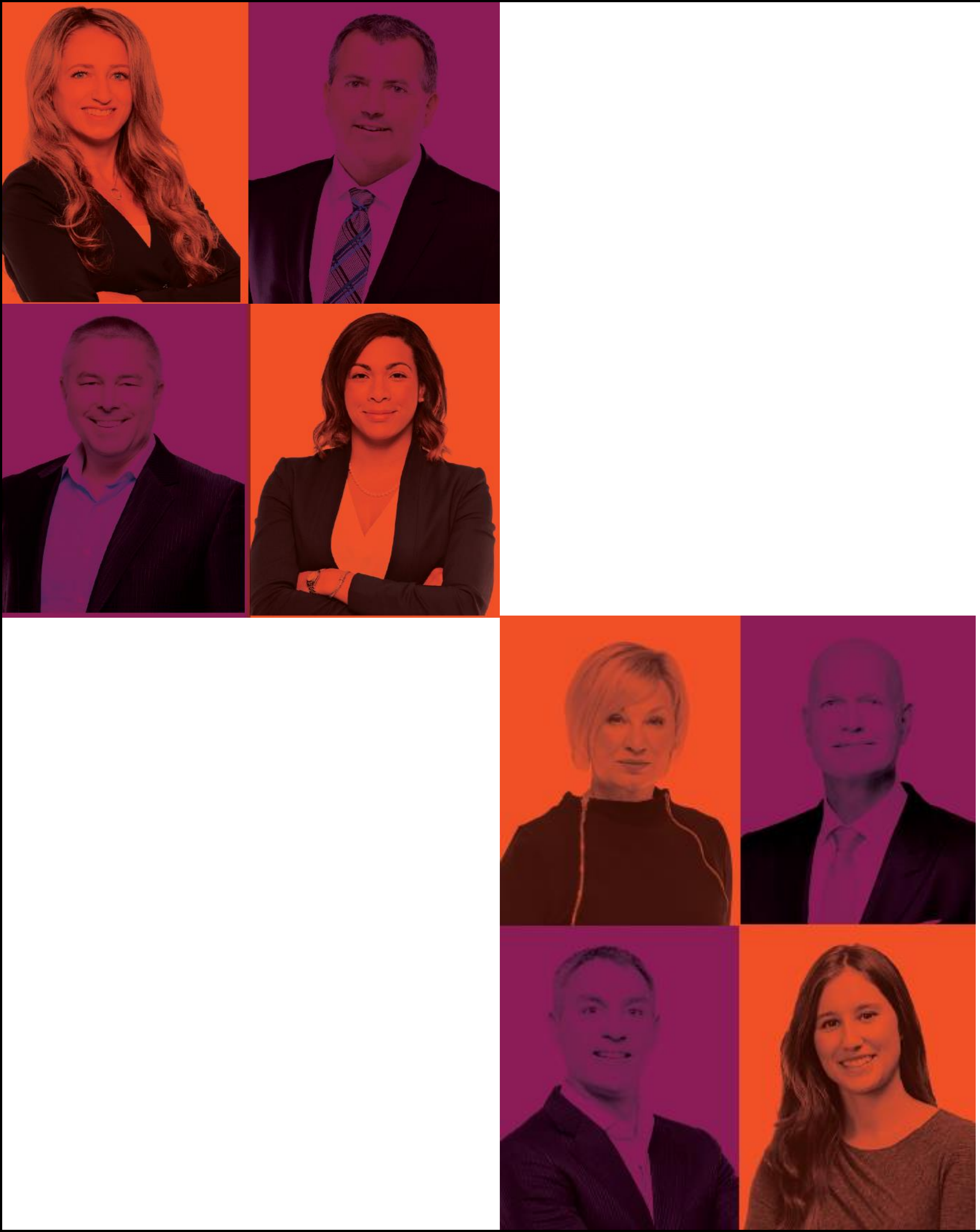
Order of Business and Voting Procedures

Financial Statements

Voting

CEO Progress Update

Q&A



AGENDA

Appointments

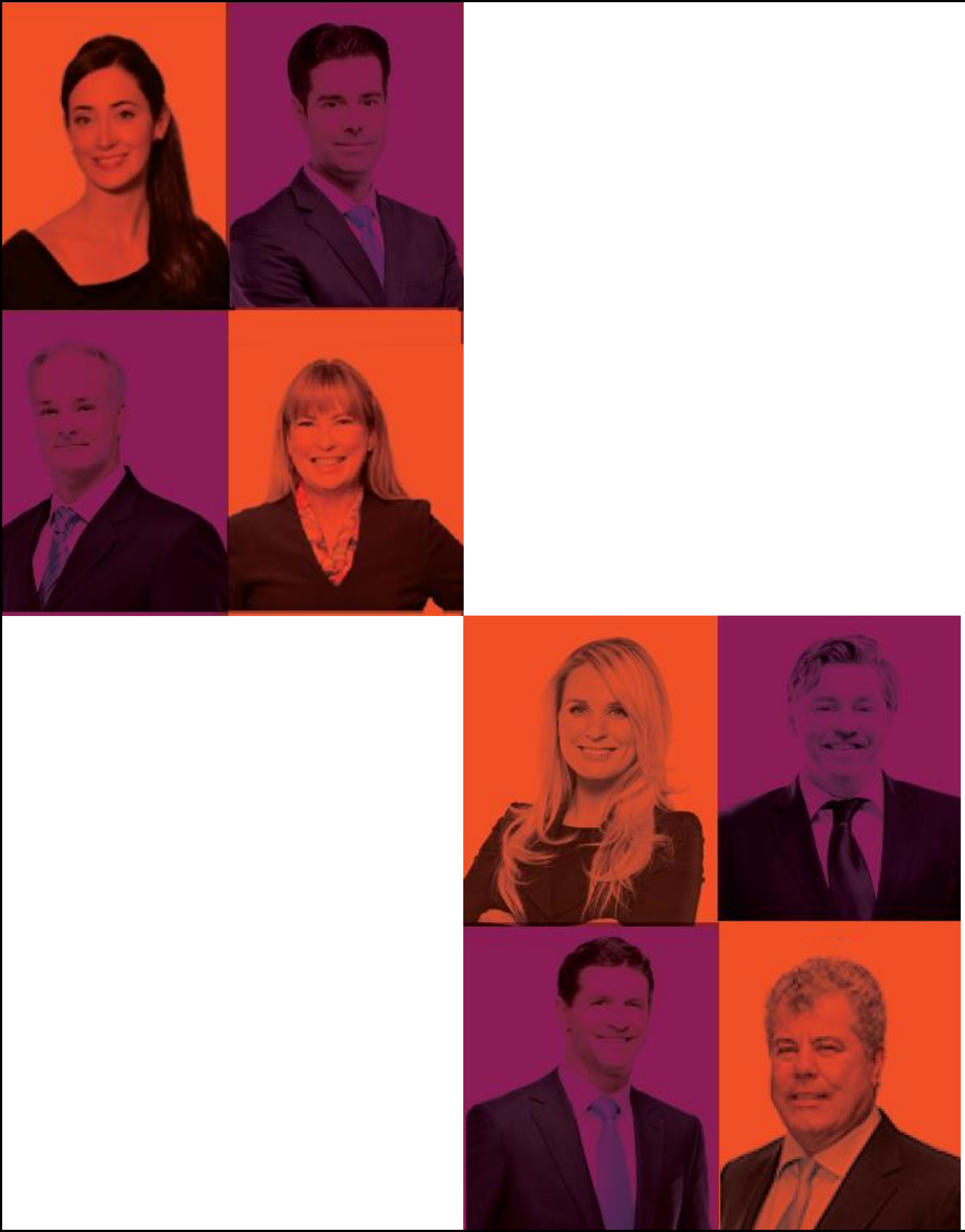
Order of Business and Voting Procedures

Financial Statements

Voting

CEO Progress Update

Q&A



AGENDA

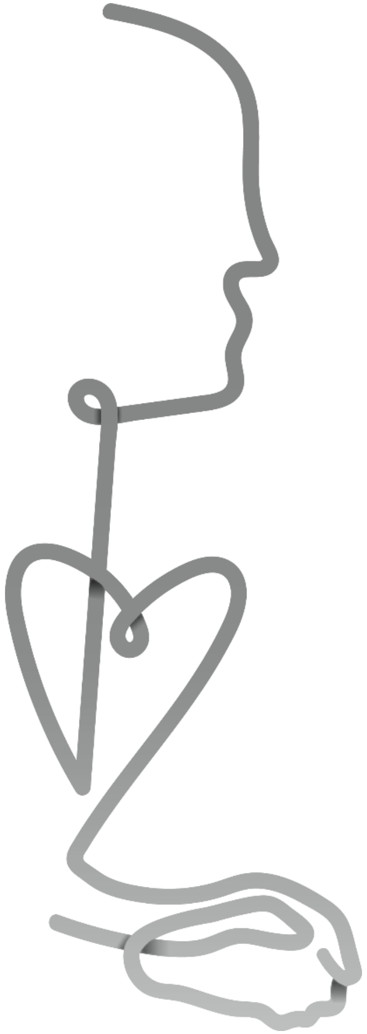
- Appointments
- Order of Business and Voting Procedures
- **Financial Statements**
- Voting
- CEO Progress Update
- Q&A

AGENDA

- Appointments
- Order of Business and Voting Procedures
- Financial Statements
- **Voting**
- CEO Progress Update
- Q&A

KISH KAPOOR

President and Chief Executive Officer



HEAD

Envision the future, set ambitious goals

HEART

Inspire and empower people

HANDS

Live up to the promise of the name on the door

Leading with head, heart, and hands…

James A. Richardson and Winston Churchill


It started with a conversation on the dock…….

Greg Bieber, Hartley Richardson, and Sandy Riley
at the Winnipeg Art Gallery - Qaumajuq

Advisors
are our
Clients

We are **focused on their success** and are committed to creating a **best-in-class experience** for them

A **remarkable** year

Record financial results

Recruiting success

$200 million credit facility

Investing in our people & in **Our Bold Digital Journey**

Renaissance of a bygone era

Remember when the name on the door meant something …

McLeod Young Weir
Levesque Beaubien Geoffrion
First Marathon
McNeil Mantha
Midland Walwyn
Walwyn Stodgell Cochran
Murray
JD Mack
WD Latimer

Gordon Capital
Lafferty Harwood
Bunting Warburg
Pitfield McKay Ross
Bache
Domenic Domenic
AE Ames
Doherthy Roadhouse
McQuaig

Mackie
Odlum Brown
Leede Jones Gable
Lowen McCutchen
Burgess & Co
Deacon
Chisholm
First Canada
Merritt

Pollitt & Co
Brown Baldwin Nisker
Osler Wills Bickle
Saumier Morrisson
Davidson Partners
Geoffrion Leclerc
Guy Breault O’Brien
Securities
Hope & Co

THE CONLIN GROUP

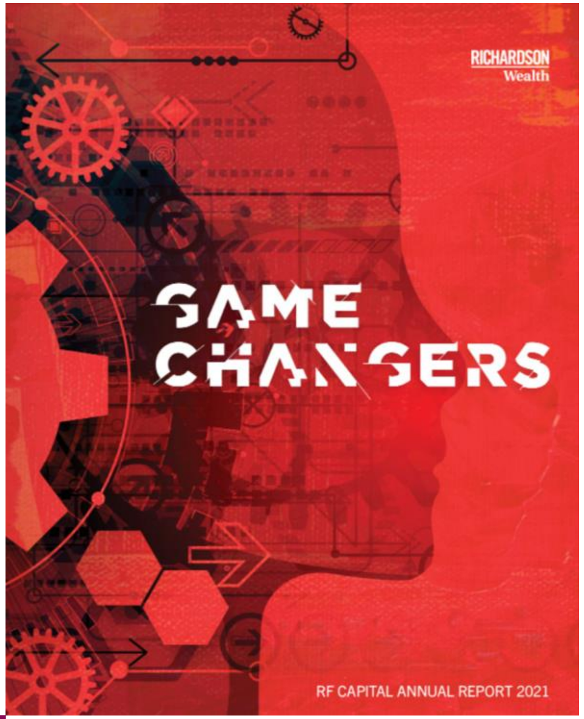
Massive Gamechanger chooses Richardson Wealth

An exciting announcement from The Conlin Group.

RICHARDSON
Wealth

Share price lagging our early success, but we are working to address…..

- Continue to gather investor/analyst feedback
- Expand analyst coverage
- Share our story more widely
- Consolidate our shares
- Return capital by buying back our stock
- **Create value by building a GREAT BUSINESS**



Recall: We have **bold and audacious goals**

To be the brand of choice for Canada's top advisors & their high net-worth clients

And to grow significantly

	FROM	TO
AUA[1,2]	$33B	$100B
REVENUE[3]	$325M	$1B
ADJ. EBITDA[4]	$50M	$200-300M

1. Q1 2021
2. Assets under administration (AUA) is a measure of client assets and is common to the wealth management business. AUA represents the market value of client assets managed and administered by us from which we earn commissions and fees
3. Annualized Q1 2021
4. Considered to be a non-GAAP financial measure. Such measures do not have any standardized meaning prescribed by GAAP under IFRS and are therefore unlikely to be comparable to similar measures presented by other issuers. For further information please read the "Presentation of Financial Information and Non-GAAP Measures" in our 2021 Annual MD&A, which can be found under our profile at www.sedar.com and is incorporated by reference.

Gamechanging Thinking Gamechanging Results

Gamechangers are a different shape and colour. They think, work and react differently. **They alter the game, and the way things are done.**

Leading providers of digital solutions

uniFide + ENVESTNET®

- ~$14 Trillion in Assets Under Administration
- ~ $4 Trillion in custodied assets
- Leading suite of customizable tools

- Used by more than 100,000 advisors
- ~5,100 companies
- ~ $5 Trillion in Assets Under Administration

Creating a **best-in-class** advisor experience

- Richardson Wealth Masterclass
- Advisor Concierge
- Action Desk
- Expanded Tax & Estate Planning
- Succession Planning
- Technology Investments
- RWL University
- Recognition and Rewards
- In-house Insurance Capability

Preparing the Next Generation of Leaders

Natalie Bisset
Corporate Development

Julie Burnham
Strategic Communications

Mike Ankers
Advisor Experience and Growth

Kerri-Ann Clare Sylvestre
Capital Markets, ECM

Scott Stennett
Technology and Operations

Lynne Brejak
Human Resources

Sarah Widmeyer
Wealth Strategies

James Price
Investment Strategist

Tim Wilson
Finance and Treasury

Jan Sampson
Operations

Michael Williams
Enterprise Risk Management

Krista Coburn
General Counsel

Christina Clement
Practice Management

An Nguyen
Investment Services


RICHARDSON Wealth
Patrimoine RICHARDSON
GAME CHANGERS
VIRTUAL CONFERENCE 2021
CONFÉRENCE VIRTUELLE 2021
CHANGER LA DONNE




NATALIE BISSET

Head of Corporate Development

79
teams

Pipeline[5] is growing

5. Represents conversation with advisors that have advanced beyond a certain probability threshold, and is a measure that management uses to assess outside advisors' interest in our firm. We expect to convert only a portion of this pipeline.

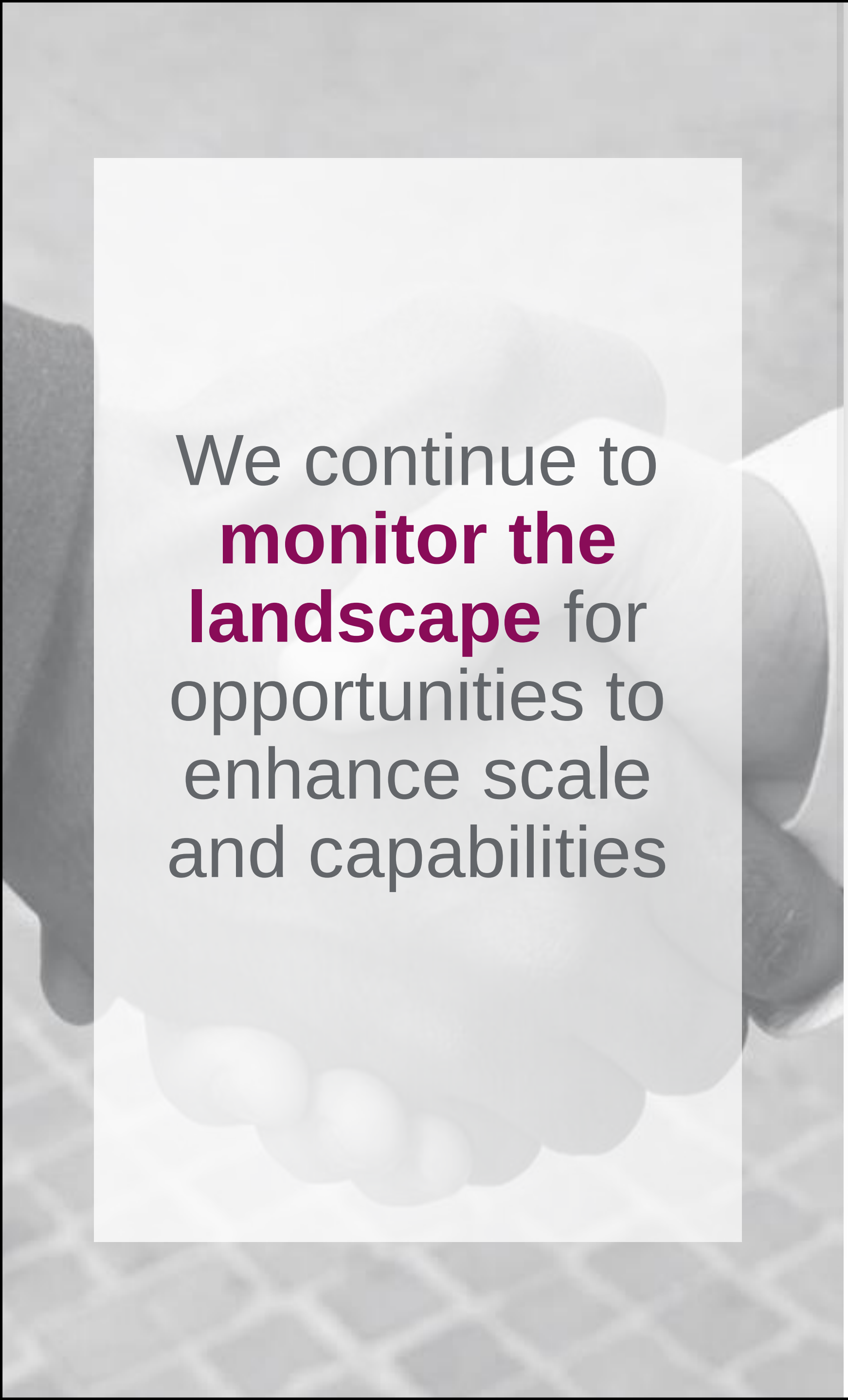
Best recruiting year since 2016

THE SUSAN O'BRIEN WEALTH ADVISORY GROUP

Massive **Gamechanger** chooses Richardson Wealth

An exciting announcement from The Susan O'Brien Group Wealth Advisory.

RICHARDSON
Wealth



We continue to **monitor the landscape** for opportunities to enhance scale and capabilities

CORMARK SECURITIES INC.

bloom burton & co
/accelerating returns in healthcare

PURPOSE FINANCIAL

Partnerships, Mergers & Acquisitions will accelerate success

The Future of Wealth is Female

Goal: 50%

FEMALE ADVISOR POPULATION AT RICHARDSON WEALTH BY 2027

WATTage:
Women **A**t **T**he **T**able

WXN

Women's Executive Network

Our **commitment** to building stronger communities

PRIDE AT WORK CANADA

THE MILLION REASONS RUN

Richardson Wealth's Partners in Community Gifting Program

Community builders and culture ambassadors

The Royden Richardson Award

Jasmine Ariss

Shirley Hermann

Gina Letts

Shannon Jones

Serge Zaina

Award-winning advisors

Proud to call **Richardson Wealth** their home

Power of our collective efforts

AUA[1]	Fee Revenue	Commission Revenue	Operating Margin[2]	Advisor Success
$36.8 Billion	**$243 Million**	**+ 28%**	**17.8%**	**94%**
Up $6 billion from 2020	Up 17% from 2020	70% increase in new issues	Up from 14.7% in 2020	Teams achieving personal bests

+44% Adjusted EBITDA[2] at Richardson Wealth

1. Assets under administration (AUA) is a measure of client assets and is common to the wealth management business. AUA represents the market value of client assets managed and administered by us from which we earn commissions and fees
2. Considered to be a non-GAAP financial measure. Such measures do not have any standardized meaning prescribed by GAAP under IFRS and are therefore unlikely to be comparable to similar measures presented by other issuers. For further information please read the “Presentation of Financial Information and Non-GAAP Measures” in our 2021 Annual MD&A, which can be found under our profile at www.sedar.com and is incorporated by reference.

Continued momentum in Q1 2022

Meaningful rise in interest revenue with expected rise in benchmark rates

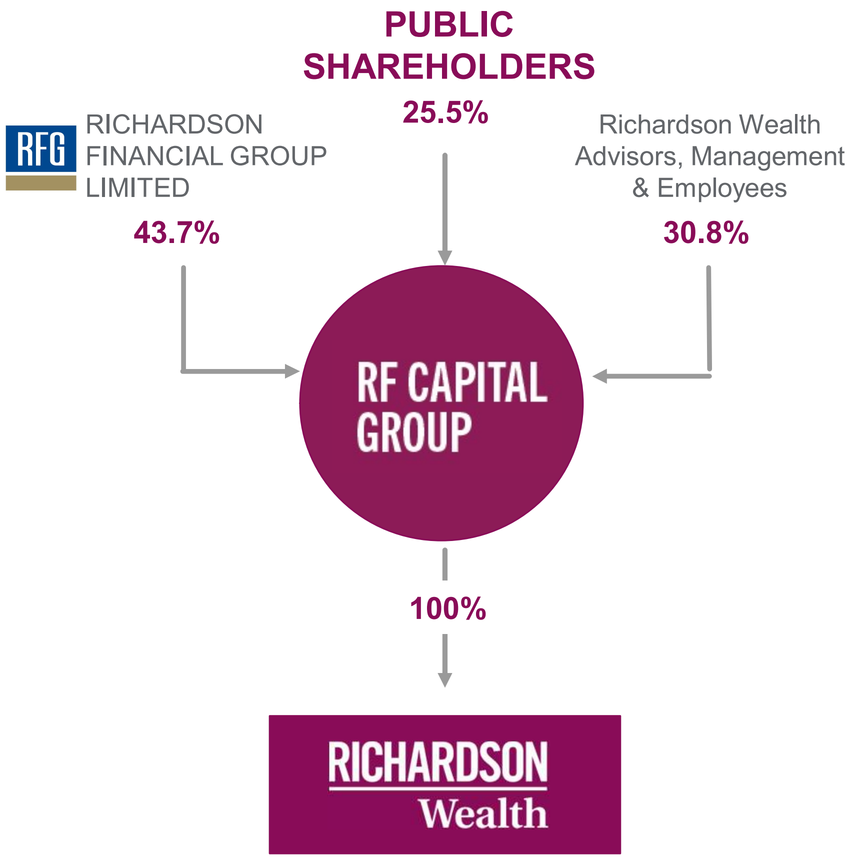
Record AUA[1]
$37.1 Billion

Recurring Fee Revenue[2,3]
89%

Insurance Revenue
+135%

1. Assets under administration (AUA) is a measure of client assets and is common to the wealth management business. AUA represents the market value of client assets managed and administered by us from which we earn commissions and fees
2. Calculated as fee revenue divided by commissionable revenue in our Wealth Management segment. Commissionable revenue includes Wealth management revenue, commission revenue in connection with the placement of new issues and revenue earned on the sale of insurance products. We use commissionable revenue to evaluate advisor compensation paid on that revenue.
3. Considered to be a non-GAAP financial measure. Such measures do not have any standardized meaning prescribed by GAAP under IFRS and are therefore unlikely to be comparable to similar measures presented by other issuers. For further information please read the "Presentation of Financial Information and Non-GAAP Measures" in our 2021 Annual MD&A, which can be found under our profile at www.sedar.com and is incorporated by reference.

Broaden investor interest…



10 for 1 Common Share Consolidation

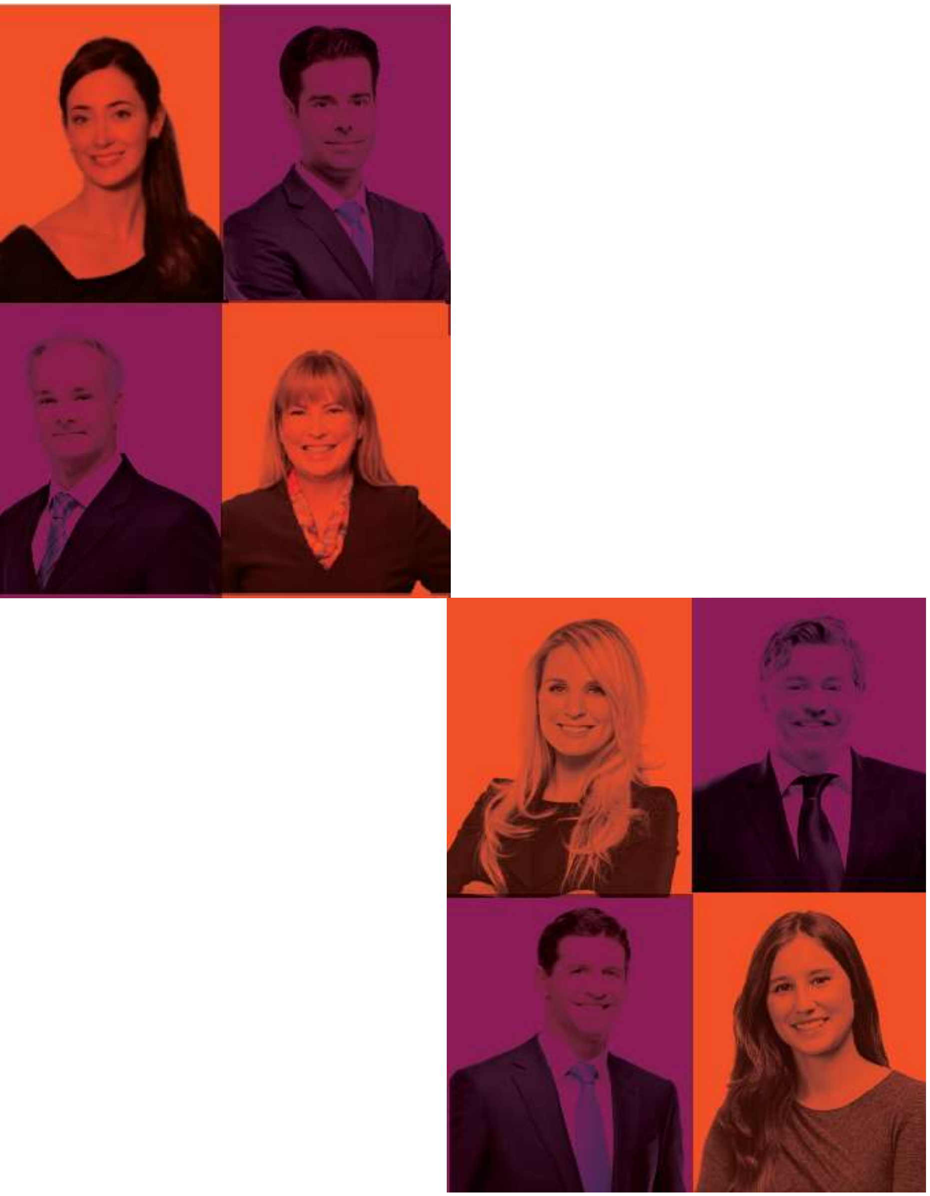
Purchase up to 10% of public float under NCIB

Bullish about our prospects

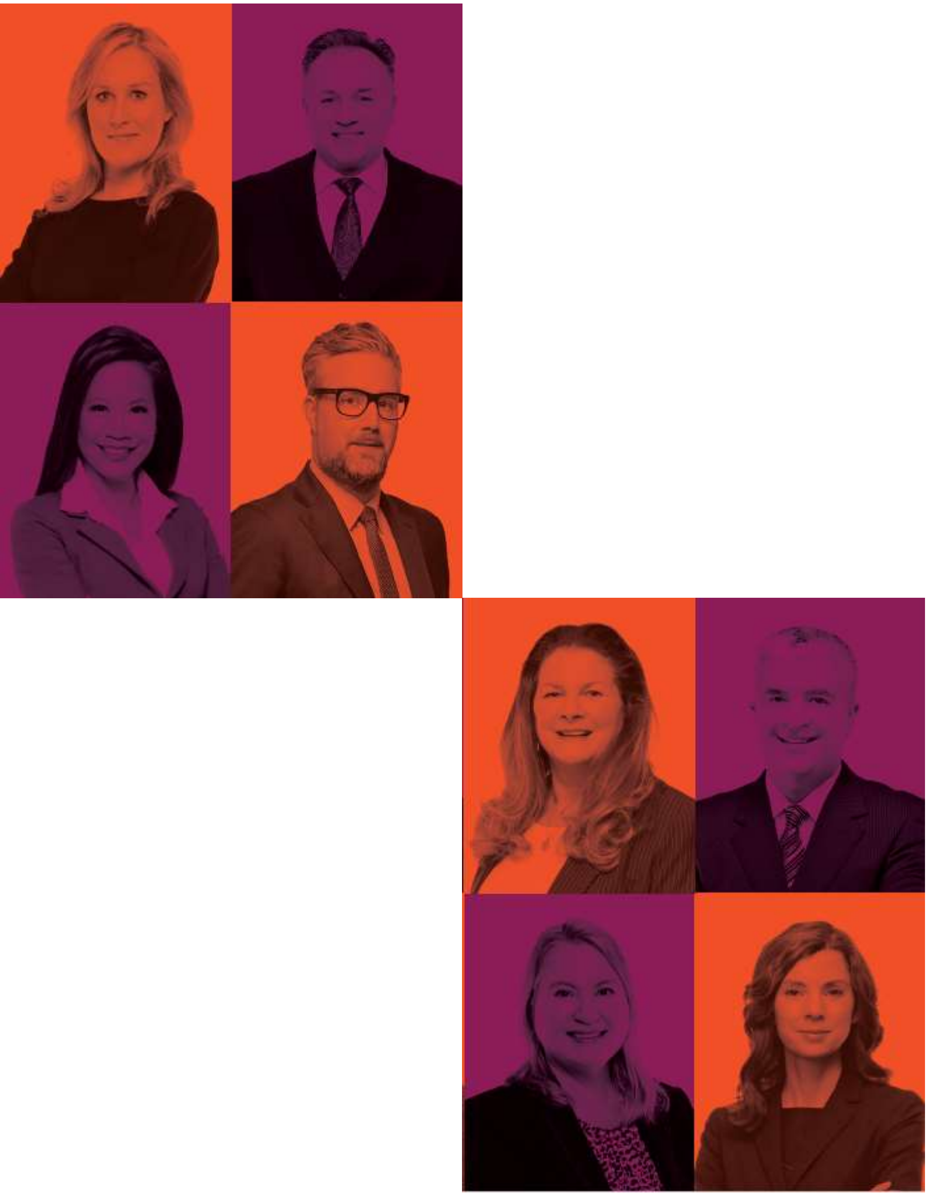
Double-down on support for advisors

Supercharge advisor recruitment

Acquire or partner with like-minded firms



We will continue to be mighty, **change the game** and play to win!



AGENDA

Appointments

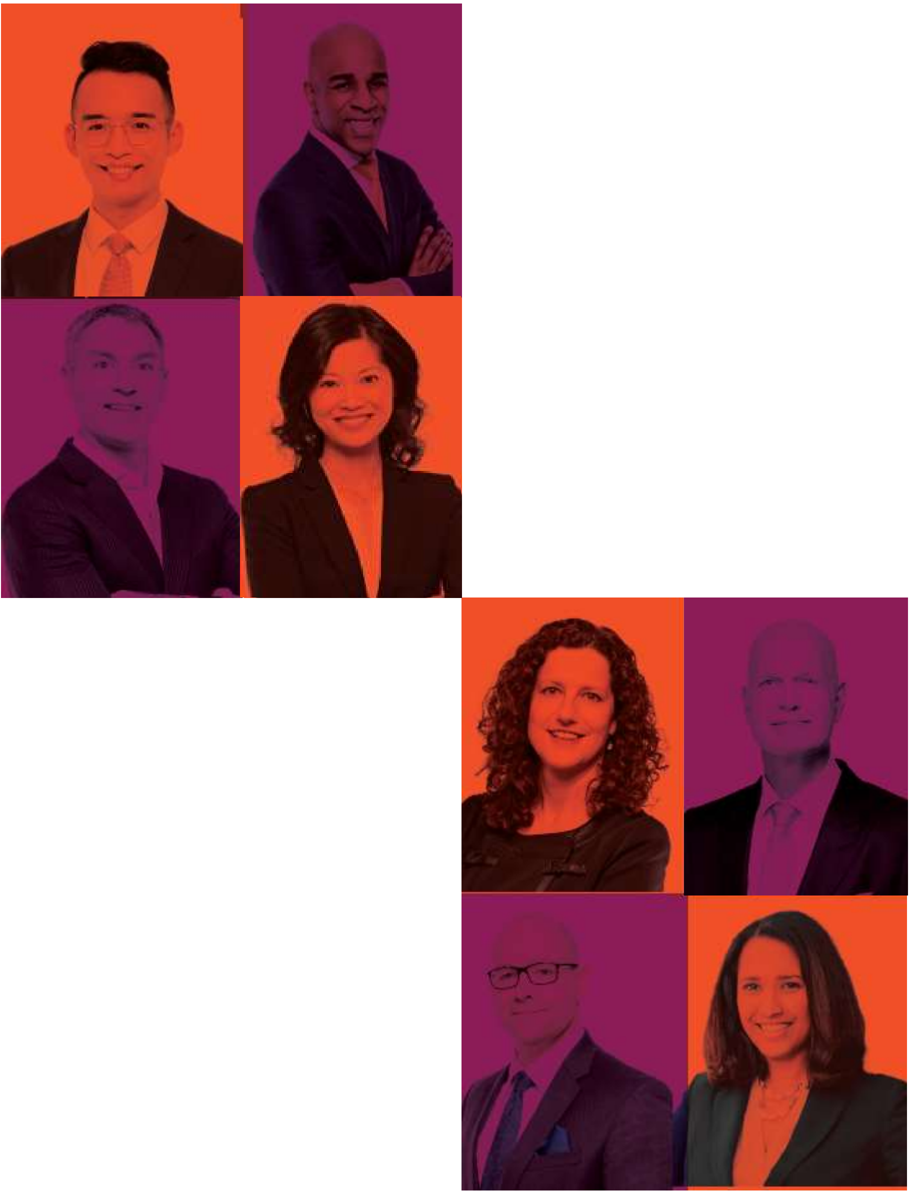
Order of Business and Voting Procedures

Financial Statements

Voting

CEO Progress Update

Q&A



RICHARDSON Wealth

Patrimoine RICHARDSON