Lower costs. Stronger plans.

J.P. Morgan Retirement Link℠ TPA

Help put plan participants on a more secure retirement path with J.P. Morgan's Retirement Link. By tapping into the breadth of capabilities from J.P. Morgan Asset Management and your TPA, we actively share our expertise and thought leadership to help enhance outcomes for defined contribution plans with $500,000 to $100+ million in assets.

Competitive pricing

- **Experience cost savings** over similar retirement plan solutions
- **Clean share classes** (like the R6) to bring institutional-level pricing to plan participants
- **Flexibility to tailor recordkeeping services** to different plan needs and budgets

Broad and proven investment capabilities

- **Access to J.P. Morgan Funds** and active managers responsible for $1.5 trillion in assets[1]
- **J.P. Morgan QDIA solutions**[2] managed by a team that seeks to deliver consistency to participants across market cycles
- **Open architecture platform** including 14,000+ funds from 200+ investment managers with no proprietary fund requirements

Best-in-class[3] service

- **Experienced relationship managers**[4] work with advisors and plan sponsors, help simplify the complex and empower better decisions
- **Collaborative planning process** confirms annual goals and measures results
- **Award-winning employee educational communications**[5] address retirement concerns beyond 401(k)s to help support stronger outcomes

Visit jpmorganretirementlink.com, contact 844-LINK-JPM or your J.P. Morgan representative to learn more.

[1] J.P. Morgan data as of 12/31/16.

[2] J.P. Morgan QDIA investment solutions include balance funds and target date fund series.

[3] Chatham Partners Satisfaction Survey, 2017. When evaluating DC providers, a top 2 box rating of 85% or greater corresponds to best-in-class rating. 8 out of the top 14 DC providers are incorporated into this survey. Best-in-class rating for Overall Satisfaction, Relationship Management and Account Management.

[4] Relationship Managers average 25 years of industry experience; 15 years with J.P. Morgan, 2016. There can be no assurance that the professionals currently employed by J.P. Morgan Asset Management will continue to be employed by J.P. Morgan Asset Management.

[5] Winner of eight Mutual Fund Education Alliance Star Awards, 2014 through 2016 including Overall Retirement Communications. Winner of two 2014 Pensions & Investments' Eddy Awards.

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AVAILABLE PRODUCT FEATURES	SMALL-TO-MID	MICRO
TARGET MARKET	$5 million to $100+ million in retirement plan assets	$500,000 to $5 million in retirement plan assets
PLAN TYPES		
• 401(k)	yes	yes
• 401(a)	yes	yes
• Non qualified deferred compensation	yes[6]	no
DEDICATED RELATIONSHIP AND ADMINISTRATIVE ACCOUNT MANAGERS		
• Facilitated planning with advisor and plan sponsor to confirm annual goals and measure results	yes	yes
DEDICATED IMPLEMENTATION MANAGER	yes	yes
MEETINGS		
• Plan implementation	phone-based	phone-based
• Ongoing relationship	in-person	phone-based
• Participant education	in-person	Ongoing: live webinar and recorded presentations
J.P. MORGAN INSIGHTS		
• Market, investment and retirement information	yes	yes
• Re-enrollment	fully supported	fully supported
• Auto features	fully supported	fully supported
INVESTMENT OFFERINGS		
• Open architecture	14,000 funds from 200+ investment managers	14,000 funds from 200+ investment managers
• Proprietary fund recordkeeping offset	yes	yes
• Managed accounts, guidance and advice[7]	yes	yes
• Self-directed brokerage account	yes	yes
• Recordkeeping services for publicly traded company stock (pre-approval required)	yes	yes
FIDUCIARY TOOLS		
• Annual business plan	yes	yes
• Quarterly investment and plan review	yes	yes
• 3(21) and 3(38) fiduciary services solutions[8]	yes	yes
• Plan expense management	yes	yes
PLAN SPONSOR SERVICES		
• Plan Service Center website	yes	yes
• Payroll services	yes	yes
• Online and on-demand plan analytics	yes	yes
• Streamlined administrative support to ease administrative burden including: print and mail participant notices, eligibility tracking, beneficiary recordkeeping and distribution and loan support services	yes	yes
PARTICIPANT SERVICES		
• Multi-touch, multi-channel participant communications program	yes	yes
• Retirement income projections on web	yes	yes
• Participant service center – Website, Voice Response System and call center	yes	yes
• Foreign language support	yes	yes

[6] Suited to accompany larger defined contribution plans; non qualified deferred compensation plan must already exist (e.g. non start-up)

[7] Participant Advisory Services is offered by Advised Assets Group, LLC (AAG), a federally registered investment adviser. More information can be found at www.adviserinfo.sec.gov. All rights reserved. JPMorgan Invest Holdings, LLC is not affiliated with Advised Assets Group, LLC.

[8] The 3(21) and 3(38) Fiduciary Services solutions are provided by Morningstar Investment Management LLC and are available through J.P. Morgan Retirement Link. Morningstar Investment Management LLC is a registered investment adviser and subsidiary of Morningstar, Inc. Morningstar Investment Management LLC acts as a fiduciary under ERISA Section 3(21)(A)(ii) and 3(38) with respect to the services described herein but is not acting in the capacity of adviser to individual investors. Morningstar Investment Management LLC is not affiliated with J.P. Morgan or its subsidiaries and affiliates. The Morningstar name and logo are registered marks of Morningstar, Inc.

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