



WORKING
TOGETHER
TO BUILD
STRONGER
PORTFOLIOS

Four ways J.P. Morgan helps
solve your investment needs

The path to a stronger portfolio starts here

It takes more than money to achieve life's most important goals. It takes a carefully built mix of investments. A strong portfolio that stands steady even when markets aren't, where each piece does more together than it ever could apart.

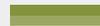
At J.P. Morgan Asset Management, we work alongside financial advisors to understand what investors like you need and where we best fit in your overall plans. For more than 150 years, we've built stronger portfolios with a longer-term focus on keeping our clients invested and on course through changing markets. No matter what your goal, count on us for insights and investments to help you solve it.



1. ACTIVELY SHARING EXPERTISE



2. EMPOWERING BETTER DECISIONS



3. BUILDING THE RIGHT INVESTMENT PORTFOLIO



4. TAPPING INTO PROVEN SUCCESS



LET'S SOLVE IT.®

Global network of professionals committed to informed investing and your success

With J.P. Morgan, your money is in the hands of experienced professionals, backed by the deep resources of one of the world's largest investment managers.

Our people make the difference

Research-driven approach: We analyze every detail to uncover investment opportunities and risks others might miss.

Lifelong analysts: Research is a career at J.P. Morgan, not a stepping stone to other jobs. This has allowed our analysts to become experts on specific industries and companies over the years.

Local teams: Living in the markets we cover gives us firsthand experience with local cultures, economies, politics and other factors affecting your investments.



1,000+ professionals

gather information locally and share it globally to make better decisions on your behalf¹

5,000+ company visits

allow us to meet face to face with the businesses in our investment universe¹

\$315+ million

spent each year to research potential investments and keep tabs on those we already own¹

¹ Source: J.P. Morgan Asset Management, as of December 31, 2016.

Insights designed to make the complex simpler and help you stay invested longer

At J.P. Morgan, we believe a more informed investor is a more successful investor. That's why we provide the educational tools and resources it takes to make sound decisions with confidence. Together with guidance from your advisor, these insights help us all think through the key issues and build the right portfolio for your goals.

Simplify complex markets

to better understand what's happening and what it means to your portfolio

Pursue important goals

with expert insights into retirement, college and other top priorities

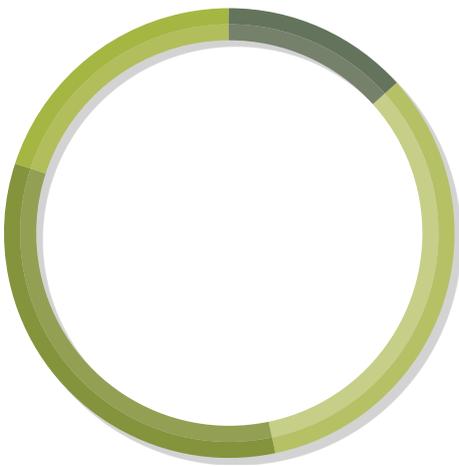
Stick with your plan

for the long term by taking the emotion and uncertainty out of investing



Investment capabilities across all asset classes to broaden your choices and diversification

J.P. Morgan manages investment strategies covering all the asset classes that make up a strong, well-balanced portfolio. Each of our offerings is designed to play a specific role while also working in conjunction with your other holdings to diversify risk and improve return potential. From stocks and bonds, to money markets and alternatives, you and your advisor will find a wide range of mutual funds and ETFs for creating an investment mix matching your unique needs.



Stocks

for long-term growth potential

Bonds

for income, total return and diversification

Alternatives

for diversification and risk management

Money markets

for stability and liquidity

Multi-asset strategies
spanning all of these investments

J.P. Morgan also offers:

- More than 50 funds with share classes rated ★★★★★ or ★★★★★ by Morningstar¹
- A growing lineup of ETFs for investors seeking J.P. Morgan's management expertise along with lower costs, more trading flexibility and greater tax efficiency
- 529 college savings plan providing a tax-advantaged way to invest for your loved one's future

¹ Source: Morningstar; as of 12/31/16. Morningstar rates mutual funds from one to five stars based on how well they've performed. The Morningstar Rating™ for funds, or "star rating," is calculated for managed products (including mutual funds, variable annuity and variable life subaccounts, exchange-traded funds, closed-end funds and separate accounts) with at least a 3-year history. Exchange-traded funds and open-ended mutual funds are considered a single population for comparative purposes. It is calculated based on a Morningstar Risk-Adjusted Return measure that accounts for variation in a managed product's monthly excess performance, placing more emphasis on downward variations and rewarding consistent performance. The top 10% of products in each product category receive 5 stars, the next 22.5% receive 4 stars, the next 35% receive 3 stars, the next 22.5% receive 2 stars and the bottom 10% receive 1 star. The Overall Morningstar Rating for a managed product is derived from a weighted average of the performance figures associated with its 3-, 5- and 10-year (if applicable) Morningstar Rating metrics. The weights are: 100% 3-year rating for 36-59 months of total returns, 60% 5-year rating/40% 3-year rating for 60-119 months of total returns and 50% 10-year rating/30% 5-year rating/20% 3-year rating for 120 or more months of total returns. While the 10-year overall star rating formula seems to give the most weight to the 10-year period, the most recent 3-year period actually has the greatest impact because it is included in all three rating periods. Rankings do not take sales loads into account.

More than 150-year legacy of responding to investor needs

With a track record dating back to 1865, there's unlikely to be an investor need, market development or economic cycle we haven't seen before. And while investing conditions are constantly changing, our commitment remains the same—to deliver the strong risk-adjusted return potential needed to reach your goals.

Invest with a trusted and experienced leader

Guided investors through **31 economic recessions** and recoveries



Adapted to **30 U.S. presidents** and changing politics worldwide



Assisted in financing the **Statue of Liberty** in 1886



Established **U.S. Steel** and **General Electric** in 1906



Helped **rescue the U.S. financial system** from crisis in 2008

TODAY

Manage **\$1.5 trillion** in client assets¹

More than **150 years experience** serving investors and their financial advisors

8th largest mutual fund family out of 252 in the U.S.²

¹ Source: J.P. Morgan Asset Management, as of December 31, 2016.

² Source: J.P. Morgan Asset Management, as of February 2017. Includes active firms only with at least \$1 billion AUM, excluding money market and ETF.

Building stronger portfolios

At J.P. Morgan Asset Management, collaborating with our clients in an effort to build stronger portfolios drives everything we do.

We're committed to sharing our expertise, insights and investment solutions across all asset classes to help you and your financial advisor make better decisions and enjoy greater success. Whatever you're looking to achieve, together we can solve it.



LET'S SOLVE IT.®

To learn more

Please consult your financial advisor, visit jpmorganfunds.com or call 1-800-480-4111.

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Investing involves risk, including possible loss of principal.

J.P. Morgan Asset Management is the brand name for the asset management business of JPMorgan Chase & Co. and its affiliates worldwide.

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