

J.P. Morgan model portfolios

Precision-built to help you to meet your investment needs

Built by experts. Delivered in partnership with your financial professional.

One of the best ways to navigate today's fast-changing markets is by investing with a financial professional who can help guide you through the challenges and toward your goals. A J.P. Morgan model portfolio can help too. It's a well-diversified portfolio managed by a dedicated team of experts who continuously monitor risks and identify opportunities to help you pursue your investment goals.

Our models give you access to the expertise and insights of J.P. Morgan Asset Management

- 50+ years managing multi-asset portfolios
- 106+ professionals focused on multi-asset investing
- Over \$286B in multi-asset portfolios under supervision
- Built with strategies from our teams in over 70 markets around the globe

Source: J.P. Morgan Asset Management, as of 12/31/22.

Why invest in a model portfolio from J.P. Morgan?



Designed to meet your investment needs

Precision-built portfolios designed to fit your individual goals

- Grow wealth
- Generate income
- Preserve capital
- Enhance after-tax returns

Delivered across varying risk levels with the option to switch models if your needs change



Built and managed by multi-asset experts

Daily portfolio management from a dedicated team of specialists

- Actively managed portfolios
- Built to adapt to market conditions
- Managed with a disciplined approach

J.P. Morgan's industry-leading investment insights inform every decision



Delivered in partnership with your financial professional

Ongoing updates to your financial professional keep you informed

- Performance updates
- Trade alerts
- Market insights

Track progress towards your goals and understand when your portfolio changes and why

A range of model portfolios to meet your goals

	 Strategic	 Tactical	 Income	 Absolute return
Investor goal	Grow wealth Preserve capital	Grow wealth Preserve capital	Generate income	Preserve capital
Investment approach	Maintains allocation to long-term investment mix with periodic re-balancing	More flexibility to adjust portfolio as short-term opportunities and risks arise	Focused on delivering consistent income through investments that pay interest and dividends	Low-volatility portfolio to help maintain existing wealth

Risk/return profiles

Conservative	●	●	●	●
Moderate conservative	●	●		
Moderate	●	●	●	
Growth	●	●	●	
Aggressive	●	●		

Ready to get started?

Contact your financial professional to learn more about J.P. Morgan model portfolios and determine which might be right for meeting your investment goals.

Opinions, estimates, forecasts, and statements of financial market trends that are based on current market conditions constitute our judgment and are subject to change without notice. We believe the information provided here is reliable. These views and strategies described may not be suitable for all investors. References to specific securities, asset classes and financial markets are for illustrative purposes only and are not intended to be, and should not be interpreted as, recommendations. Past performance is no guarantee of future results.

RISKS ASSOCIATED WITH INVESTING: Stock investing involves risk including loss of principal. Small Cap stocks may be subject to a higher degree of risk than more established companies' securities. The illiquidity of the Small Cap market may adversely affect the value of these investments. Investing in real estate/REITs involves special risks such as potential illiquidity and may not be suitable for all investors. There is no assurance that the investment objectives of this program will be attained. International investing involves a greater degree of risk and increased volatility. Changes in currency exchange rates and differences in accounting and taxation policies outside the U.S. can raise or lower returns. Also, some overseas markets may not be as politically and economically stable as the United States and other nations. Bonds are subject to market and interest rate risk if sold prior to maturity. Bond values will decline as interest rates rise and are subject to availability and change in price. High yield/junk bonds (grade BB or below) are not investment grade securities, and are subject to higher interest rate, credit, and liquidity risks than those graded BBB and above. They generally should be part of a diversified portfolio for sophisticated investors. The cash portion of the portfolio is in money market instruments. There is no guarantee that a diversified portfolio will enhance overall returns or outperform a non-diversified portfolio. Diversification does not protect against market risk. The target return, volatility target and controlled beta target (collectively, the "Targets") shown are not meant to represent actual experience of the Strategy. These Targets are provided for illustrative purposes only and are subject to significant limitations. An investor should not expect to achieve actual Strategy experience similar to the Targets shown herein. The Targets are the manager's goals based on the manager's calculations using available data, assumptions based on past and current market conditions, and available investment opportunities, each of which are subject to change. Because of the inherent limitations involved in setting these Targets, potential

investors should not rely on them when making a decision on whether or not to invest in this Strategy. The Targets cannot account for the impact that economic, market, and other factors may have on the implementation of an actual investment program. Unlike actual performance, the Targets do not reflect actual trading, liquidity constraints, fees, expenses, taxes and other factors that could impact the future performance of the Strategy. The manager's ability to achieve the Targets is subject to risk factors over which the manager may have no or limited control. Prospective investors should understand the risks factors associated with the Strategy. No representation is being made that the Strategy will achieve the Targets or its investment objective. Actual Strategy experience could be higher or lower than the Targets. Managers seek to achieve the stated objectives. There is no guarantee the objectives will be met. There can be no assurance that the professionals currently employed by JPMAM will continue to be employed by JPMAM or that the past performance or success of any such professional serves as an indicator of such professional's future performance or success. Any securities/portfolio holdings mentioned throughout the presentation are shown for illustrative purposes only and should not be interpreted as recommendations to buy or sell. A full list of firm recommendations for the past year are available upon request. Telephone calls and electronic communications may be monitored and/or recorded. Personal data will be collected, stored and processed by J.P. Morgan Asset Management in accordance with our privacy policies at <https://www.jpmorgan.com/privacy> If you are a person with a disability and need additional support in viewing the material, please call us at 1-800-343-1113 for assistance. J.P. Morgan ETFs are distributed by JPMorgan Distribution Services, Inc., (1111 Polaris Pkwy, Columbus, OH 43240) which is an affiliate of JPMorgan Chase & Co. Affiliates of JPMorgan Chase & Co. receive fees for providing various services to the funds. JPMorgan Distribution Services, Inc. is a member of FINRA. JPMorgan Funds are distributed by JPMorgan Distribution Services, Inc. (JPMDS) and offered by J.P. Morgan Institutional Investments, Inc. (JPMII); both affiliates of JPMorgan Chase & Co. Affiliates of JPMorgan Chase & Co. receive fees for providing various services to the funds. JPMDS and JPMII are both members of FINRA. J.P. Morgan Asset Management is the marketing name for the asset management businesses of JPMorgan Chase & Co. and its affiliates worldwide.

Copyright 2023 JPMorgan Chase & Co. All rights reserved.
09dp232701163956