

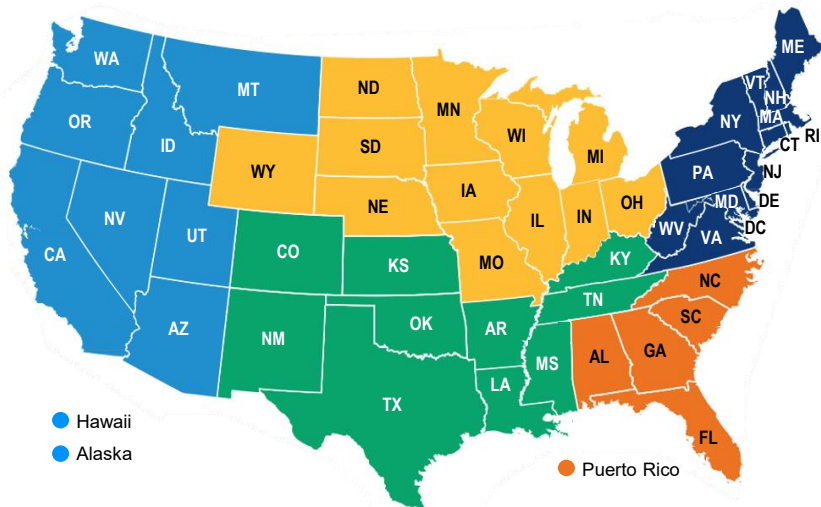
Subadvisory Client Advisor Team

Our only business is strengthening yours

Gain access to J.P. Morgan’s unparalleled global reach and resources through a dedicated team focused on our insurance and annuity partners.

Insights and essentials programs for informing clients on retirement and investment decisions

Annuity Essentials	Market Insights	Retirement Insights	Portfolio Insights
<ul style="list-style-type: none"> • Annuities Improve Outcomes • Annuity Essentials & Principles for Investing • The Annuity Advantage • An Essential Slice of the Retirement Pie • Annuity Insights and resources: jpmorgan.com/annuity 	<ul style="list-style-type: none"> • Guide to the Markets® • Principles for Successful Long-Term Investing • Insights Now • Weekly insights • Market commentary & thematic presentations • Quarterly & market response calls 	<ul style="list-style-type: none"> • Guide to RetirementSM • Principles for a Successful Retirement • Target Date Compass® • Core Menu Evaluator® • Proprietary and thematic research • Legislative and regulatory updates 	<ul style="list-style-type: none"> • Customized portfolio analytics • Long-Term Capital Market Assumptions • Multi-Asset Solutions Strategy Report • Quarterly asset class views • Research publications • Investing frameworks



Map not to scale.

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Available in 2026

New Annuity Essentials to use throughout the year



Annuities Improve Outcomes

Use our latest research to identify client profiles most likely to benefit from annuities and illustrate the positive impacts of insured retirement solutions.



Annuity Essentials & Principles for Investing

Explore eight essential principles and actionable strategies to help clients achieve stronger investment outcomes and greater retirement confidence with annuities.



The Annuity Advantage

Learn about Dr. David Kelly's research on how annuities can increase retirement income and reduce longevity risks, especially as long-term return expectations decline.



Annuities: An Essential Slice of the Retirement Pie

Discover how annuities can help solve common retirement challenges now facing advisors and investors in the context of portfolio construction.

Meet our team of experts

Market Insights



Dr. David Kelly
Chief Global Strategist



Gabriela Santos
Chief Market Strategist

Retirement Insights



Michael Conrath
Chief Retirement Strategist



Sharon Carson
Retirement Strategist

Visit: jpmorgan.com/annuity

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