

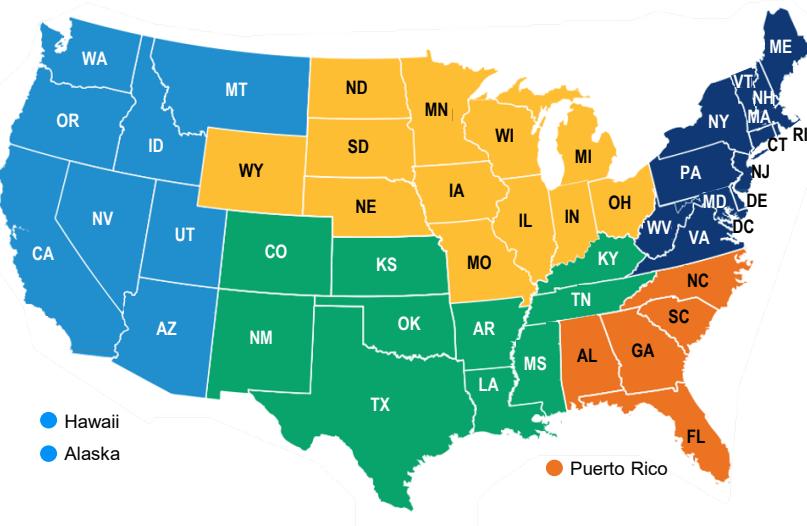
# Subadvisory Client Advisor Team

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



## Subadvisory Client Sales Team

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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

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