

Pursue your goals with model portfolios

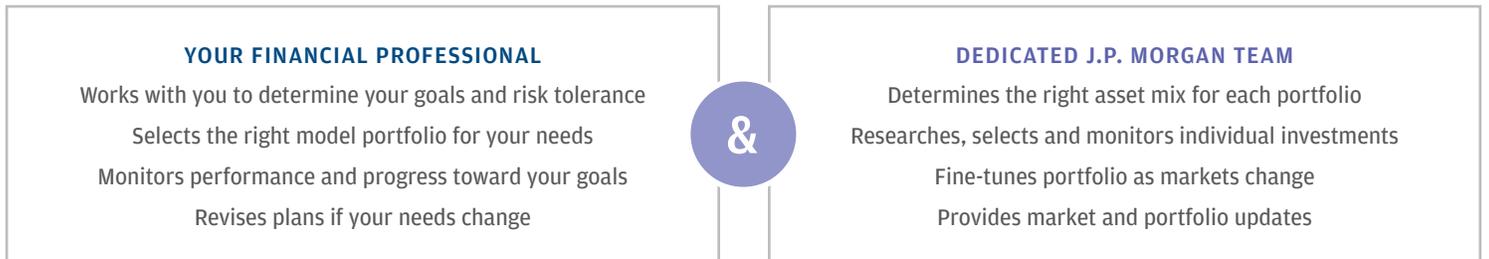
Benefit from a broadly diversified and expertly managed portfolio

J.P. Morgan Asset Management’s model portfolios are designed to help you meet your unique financial goals. Are you seeking higher returns? Lower risk? More income? Whatever your goals, you can take advantage of our investment expertise to help get you there.

WHAT IS A MODEL PORTFOLIO?

Model portfolios combine a diversified mix of investments into a single convenient package. Our team of experts carefully selects investments and constantly monitors them to pursue specific risk/return objectives across changing markets. Simply work with your financial professional to choose the right portfolio for your needs and let us do the rest.

Building stronger portfolios together



Put J.P. Morgan model portfolios to work for you



Why model portfolios?
Pursue your goals with greater ease and expertise



Why J.P. Morgan?
Invest with a team of professionals you can trust



Which portfolio?
Choose the solution that best meets your unique needs



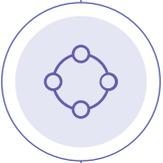
WHY MODEL PORTFOLIOS?

Pursue your goals with greater ease and expertise



EASY-TO-OWN SOLUTION

From just one investment, you receive a diversified portfolio – you and your financial professional simply choose the portfolio that most closely aligns with your needs. It's an easy way to get started with investing, transition to a portfolio that's better aligned with your goals or consolidate existing accounts.



PROFESSIONAL INVESTMENT MANAGEMENT

J.P. Morgan models are built by portfolio construction experts and consist of mutual funds and ETFs from teams specializing in different asset classes. Because everyone focuses on what they do best, you get the full benefit of their different talents, perspectives and experiences.



BROAD DIVERSIFICATION

A well-diversified model portfolio expands your opportunity for returns while limiting risks from any one asset class, sector or geographic region. At J.P. Morgan, we analyze every major global market to determine how much to allocate to achieve your long-term goals.



ONGOING PORTFOLIO OVERSIGHT

Markets don't stand still. Your portfolio shouldn't either. Our experts constantly reassess markets and reallocate your mix of investments as their outlook changes and opportunities arise. The goal is to maintain well-diversified exposure to the most attractive asset classes while reducing or avoiding those with less attractive risk and return characteristics.



INSIGHTS TO EMPOWER BETTER DECISIONS

We share our proprietary market views, investing ideas and portfolio tools to help you and your financial professional make well-informed decisions with your assets.

98% Financial professionals say model portfolios allow them to deliver better investment solutions to their clients.¹

¹ AssetMark, 2019 Impact of Outsourcing Study.



WHY J.P. MORGAN? Invest with a team of professionals you can trust

AWARD-WINNING TEAM WITH FULL ACCESS TO J.P. MORGAN'S GLOBAL INVESTMENT PLATFORM

J.P. Morgan model portfolios are offered through our Multi-Asset Solutions team – the same experienced professionals managing billions for some of the world's largest, most sophisticated investors.

Multi-Asset Solutions team

78
experts whose
only job is to
research, build &
monitor portfolios²

50+ year
track record
across changing
market cycles²

\$290+ bil.
entrusted to us
by investors^{2,3}

J.P. Morgan Asset Management

500+
investment strategies
for building well-
diversified portfolios²

1,000+
professionals based
on the ground in major
markets worldwide²

HOW WE BUILD PORTFOLIOS

We start with your portfolio's objective to determine the mix of investments and level of risk needed to achieve it. Next, we tap into resources and research across our global organization to evaluate and select portfolio holdings, manage risks and make adjustments as markets change.



² J.P. Morgan Asset Management, as of 12/31/20.

³ Excludes custom glide path and retail advisory assets.



WHICH PORTFOLIO?

Choose the solution that best meets your unique needs

Portfolios are personal. Yours should reflect what you want to accomplish, when you will need the money, how much risk you want to take and how you prefer to invest.

1. DETERMINE YOUR INVESTMENT GOAL

Talk to your financial professional about your plans and financial goals for the future. Together, you can decide which model best balances your need for growth and income with your desire to protect what you already have.



2. SELECT A PORTFOLIO ALIGNED WITH YOUR GOALS AND RISK/RETURN PROFILE



CONSERVATIVE

Seeks to maintain investment stability and minimize portfolio fluctuations for investors with a low risk tolerance



MODERATE

Seeks growth potential while generally limiting portfolio fluctuations to be less than that of equity markets for investors with a moderate risk tolerance



GROWTH

Seeks above-average growth potential for investors with a relatively high risk tolerance



AGGRESSIVE

Seeks the highest growth potential with portfolio fluctuations similar to equity markets for investors with very high risk tolerance

3. ADDRESS YOUR INDIVIDUAL NEEDS AND PREFERENCES



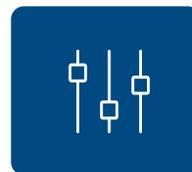
PORTFOLIO HOLDINGS

Mutual Funds, ETFs or a blend of both



INVESTMENT APPROACH

Strategic models with a buy and hold approach, tactical models that aim to capitalize on short-term market changes, or income oriented models



TAX CONSIDERATIONS

Taxable or tax-aware portfolio

J.P. MORGAN MODEL PORTFOLIOS

Choosing from thousands of different investments can be complicated and time-consuming. With a J.P. Morgan model portfolio, you and your financial professional simply pick the one solution matching your needs.

Portfolios across a range of investor goals and risk/return profiles

	STRATEGIC	TACTICAL	ABSOLUTE RETURN	INCOME
Investment approach	Benchmark-oriented models for clients who prefer a buy and hold investment approach	Flexibly adjusts portfolio allocations as short-term market opportunities arise	Low volatility approach that seeks to outperform cash by 2-3% ⁴ over a full market cycle ⁵	Targets yield-paying investments to pursue a consistent income stream
Investment goal	Grow portfolio	Grow portfolio Preserve capital	Preserve capital	Generate income
Portfolio holdings	ETF only Mutual fund/ETF blend	Mutual fund only ETF only	Mutual fund only	Mutual fund only Mutual fund/ETF blend
Geographic diversification	Global U.S.- only	Global	Global	Global
Tax-aware version available	No	Yes	No	No
RISK/RETURN PROFILES				
Conservative		✓	✓	✓
Moderate	✓	✓		✓
Growth	✓	✓		✓
Aggressive		✓		

Whether you're investing to pay expenses today, retire decades from now or achieve any goal in between, J.P. Morgan models can help you build a stronger portfolio. Contact your financial professional to review your options and get started.

⁴ There is no guarantee this target will be achieved.

⁵ A market cycle is the movement from a period of increasing prices and strong performance, or bull market, through a period of weak performance and falling prices, or bear market, and back again to a bull market.

FOR MORE INFORMATION

Contact your financial professional to learn more about J.P. Morgan model portfolios and which solution might be right for you.

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For the historical performance shown, the underlying Mutual Funds performance is based on the Institutional share class. On certain platforms, the default model will invest in the A shares of the underlying mutual fund. The expense ratios related to A shares are typically greater than the expense ratios of the Institutional Shares. The higher expense ratios of the A shares will cause performance to be lower than the performance of the Institutional shares. Certain portfolios may be invested in share classes that may not impose transaction fees and that may be different than the model provided by JPMIM to 55ip, depending on the custodian used by the financial professional.

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BRO-MODELS