Comprehensive Wealth Management Services for Your Personal Wealth

At J.P. Morgan, we take a comprehensive approach to managing your personal wealth, looking across your balance sheet with a long-term perspective to help best position you for the future. With a deep commitment to your success, we bring you solutions tailored to your individual needs, always guided by risk considerations and your best interests in everything we do.

PARTNERSHIP FOR A LIFETIME OF GOALS

Your J.P. Morgan representative partners with a dedicated team of specialists with experience in all areas of wealth management. In addition, your representative provides you with access to all the global resources available across JPMorgan Chase & Co. to help protect and grow your wealth, working in concert with your accountant, attorney and other professional advisors.

COMPREHENSIVE SERVICES

To help you meet your wealth management needs, we offer a broad range of capabilities backed by deep knowledge across disciplines.

Investments

- View on global economic and market conditions based on extensive, locally based research
- Disciplined investment management process based on our view
- Active portfolio management,* which considers risk and the potential impact of taxes
- Access to exclusive investment opportunities

Trusts and estates services

- Strategic wealth planning
- Innovative strategies developed by our in-house research group
- Leading fiduciary services
- Dedicated philanthropic expertise
- Estate settlement
- Specialty services

Lending solutions

- Effective cash management strategies
- Capital raising, not just margin lending
- Customized credit ideas
- Mortgages and home equity lines
- Ability to lend against most asset classes—including those that are restricted or otherwise highly illiquid

OUR FIRM

As a global leader in asset and wealth management services, J.P. Morgan serves two distinct client groups through two businesses: J.P. Morgan Asset & Wealth Management serves institutions and retail clients, and J.P. Morgan Private Bank serves private clients.

As one of the largest asset and wealth managers in the world, J.P. Morgan Asset & Wealth Management is a leading investment manager for institutions, financial intermediaries and individual investors globally.

Through the Private Bank, we offer a breadth and depth of experience across wealth management disciplines, including investing, wealth structuring, capital advisory, philanthropy and banking, to help clients advance toward their goals.

J.P. Morgan Private Bank

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* Discretionary investment management is offered through JPMorgan Chase Bank, N.A. and is not available in brokerage accounts.

J.P.Morgan

IMPORTANT INFORMATION

"J.P. Morgan Private Bank" is the brand name for the private banking business conducted by JPMorgan Chase & Co. and its subsidiaries worldwide.

"J.P. Morgan Asset & Wealth Management" is the brand name for the asset management businesses of JPMorgan Chase & Co.

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JPMorgan Chase Bank, N.A. and its affiliates (collectively "JPMCB") offer investment products, which may include bank-managed accounts and custody, as part of its trust and fiduciary services. Other investment products and services, such as brokerage and advisory accounts, are offered through J.P. Morgan Securities LLC (JPMS), a member of FINRA and SIPC. JPMCB and JPMS are affiliated companies under the common control of JPMorgan Chase & Co.

EQUAL HOUSING LENDER

JPMorgan Chase Bank, N.A. Member FDIC.

This is not a commitment to lend. All extensions of credit are subject to credit approval.