

A woman with dark hair pulled back, wearing a grey coat and carrying a green bag, is walking up a wide marble staircase. The staircase is made of large, light-colored marble tiles with darker veining. The background is a wall of similar marble tiles.

J.P.Morgan WEALTH MANAGEMENT

BUILD YOUR LEGACY, YOUR WAY

Whether you're building wealth, managing a business, supporting your family, giving back to your community, or planning for what's next, meaningful financial conversations can help you shape your future with more confidence.

INVESTMENT AND INSURANCE PRODUCTS:

- NOT A DEPOSIT • NOT FDIC INSURED • NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY
- NO BANK GUARANTEE • MAY LOSE VALUE

PLAN AND INVEST WITH INTENTION

Sample questions you can ask your advisor

1

PLANNING

Adapt your financial plan as your life and priorities evolve

- If I want to create a new financial plan, can you help me identify my opportunities?
- Are there planning considerations I should revisit this year?
- What tax planning strategies should we consider this year?
- Am I on track to reach my goals?

2

INVESTING

Build an investment strategy grounded in your goals and priorities

- Can you walk me through my current investment strategy and help me understand the main risks?
- Do I have the right level of cash and liquidity to support my short-, intermediate- and long-term goals?
- How are taxes, fees and implementation considerations factored into my investment strategy?
- As I get closer to retirement, should we reassess my risk capacity and investment strategy?

3

LEGACY PLANNING

Provide for loved ones, preserve wealth and honor wishes with intention

- When is it a good time to create an estate plan?
- What documents do I need to help ensure my wishes are followed if something happens to me?
- Have we coordinated account titles and beneficiary designations across all my assets, including my bank accounts?
- What is my estate tax exposure and what strategies are available to help manage it?
- How can I help ensure my wishes and values are reflected in my estate plan?

4

FAMILY & CAREGIVING

Help your family plan for life's important responsibilities

- Do you have recommendations for conversation starters that will help our family align on values?
- What steps can I take now to be ready to support my aging parents?
- How can I prepare my children for inherited wealth?
- When should we talk with the rising generation about our wealth, and what should we share?

5

PHILANTHROPY

Turn your wealth into lasting impact by giving with purpose

- How much should I allocate to charitable giving?
- How can I involve my family in my giving plan?
- How can I take a more focused approach to giving and maximize my impact?
- Can you help me build a charitable giving plan that reflects my values and goals?

IDENTIFY THE TOP 3 QUESTIONS YOU'D LIKE TO
DISCUSS WITH YOUR ADVISOR.

1. _____

2. _____

3. _____

Bring your top questions to your next meeting with your J.P. Morgan advisor.

CONTINUE THE CONVERSATION

Bring your top questions to your next meeting with your J.P. Morgan advisor to continue the conversation about what matters most to you.



Investing involves market risk, including possible loss of principal, and there is no guarantee that investment objectives will be achieved.

Past performance is not a guarantee of future results.

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Asset allocation/diversification does not guarantee a profit or protect against a loss.

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