

**J.P. Morgan Securities LLC**  
Member FINRA and SIPC

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submit this request by  
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**Mail**

J.P. Morgan Securities LLC  
Attn: Account Maintenance  
Mail Code: IL1-0291  
10 S. Dearborn St.  
Chicago, IL 60603

If you have questions,  
send us a secure message  
on [chase.com](https://chase.com) or contact  
us at (800) 392-5749.

**Use this form to**

- Set up, change or cancel statement consolidation for your J.P. Morgan Securities LLC (**JPMS**) accounts.

**What you need to know**

- By default, accounts with the same account title and mailing address are automatically packaged into a consolidated investment account statement, excluding any accounts that have been requested explicitly as a consolidated investment account statement with accounts from another account owner.
- Anyone with online access to the primary account will have access to view the entire consolidated investment account statement online. For the automatic consolidated investment account statement, the primary account is the oldest account.
- If you are changing statement consolidation for more than 6 accounts, submit additional copies of this form.
- For your protection, a representative may call you to confirm this transaction before processing it.
- For best results, complete this form using Adobe Reader. You will need to print a copy for your signature.
- Keep a copy of this request for your records.

*For the primary account,  
your signature is required  
only if you are requesting  
to add a new account to  
your statement  
consolidation.*

### 1. Tell Us About the Primary Account

Account Holder Name(s)

Account Number

Account Holder Signature

Date (month/day/year)

Joint Account Holder Signature (if applicable)

Date (month/day/year)

### 2. Tell Us About Your Updated Statement Consolidation

- ☐ Discontinue ALL statement consolidations with the primary account above.

**Additional Account 1**

Account Holder Name(s)

Account Number

Would you like to Add this account to or Remove this account from the consolidated statement with the account in Section 1?

☐ Add

☐ Remove

Account Holder Signature

Date (month/day/year)

Joint Account Holder Signature (if applicable)

Date (month/day/year)

*For additional accounts  
1-6, your signature is  
required only if you are  
requesting to add a new  
account to your statement  
consolidation.*

**INVESTMENT AND INSURANCE PRODUCTS:**

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

Additional Account 2

<div></div>	<div></div>
Account Holder Name(s)	Account Number
Would you like to Add this account to or Remove this account from the consolidated statement with the account in Section 1?	
<div><input type="radio"/> Add</div>	<div><input type="radio"/> Remove</div>
<div></div>	<div></div>
Primary Account Holder Signature	Date (month/day/year)
<div></div>	<div></div>
Joint Account Holder Signature (if applicable)	Date (month/day/year)

Additional Account 3

<div></div>	<div></div>
Account Holder Name(s)	Account Number
Would you like to Add this account to or Remove this account from the consolidated statement with the account in Section 1?	
<div><input type="radio"/> Add</div>	<div><input type="radio"/> Remove</div>
<div></div>	<div></div>
Primary Account Holder Signature	Date (month/day/year)
<div></div>	<div></div>
Joint Account Holder Signature (if applicable)	Date (month/day/year)

Additional Account 4

<div></div>	<div></div>
Account Holder Name(s)	Account Number
Would you like to Add this account to or Remove this account from the consolidated statement with the account in Section 1?	
<div><input type="radio"/> Add</div>	<div><input type="radio"/> Remove</div>
<div></div>	<div></div>
Primary Account Holder Signature	Date (month/day/year)
<div></div>	<div></div>
Joint Account Holder Signature (if applicable)	Date (month/day/year)

Additional Account 5

<div></div>	<div></div>
Account Holder Name(s)	Account Number
Would you like to Add this account to or Remove this account from the consolidated statement with the account in Section 1?	
<div><input type="radio"/> Add</div>	<div><input type="radio"/> Remove</div>
<div></div>	<div></div>
Primary Account Holder Signature	Date (month/day/year)
<div></div>	<div></div>
Joint Account Holder Signature (if applicable)	Date (month/day/year)

Additional Account 6

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Account Holder Name(s)

Account Number

Would you like to Add this account to or Remove this account from the consolidated statement with the account in Section 1?

☐ Add

☐ Remove

--	--

Primary Account Holder Signature

Date (month/day/year)

--	--

Joint Account Holder Signature (if applicable)

Date (month/day/year)