

Instructions for External Investment Account Transfers

See below to learn how to transfer investments to fund your J.P. Morgan Online Investing account or J.P. Morgan Wealth Management brokerage account.

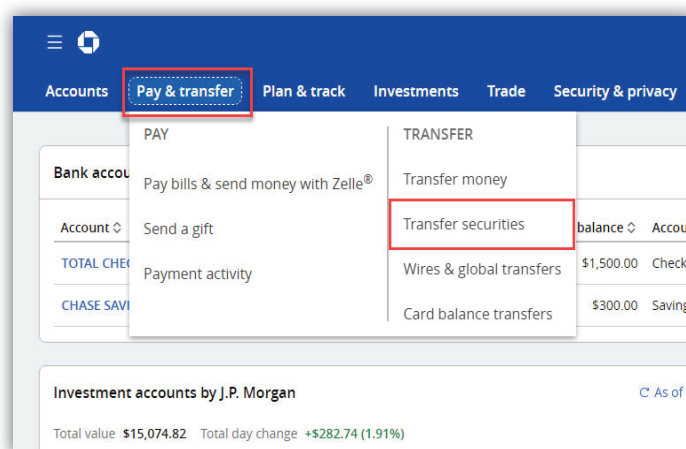
Note: You can transfer some or all of your eligible assets from external accounts.

To fund your full-service managed account, please contact your J.P. Morgan Advisor to get their sign-off.

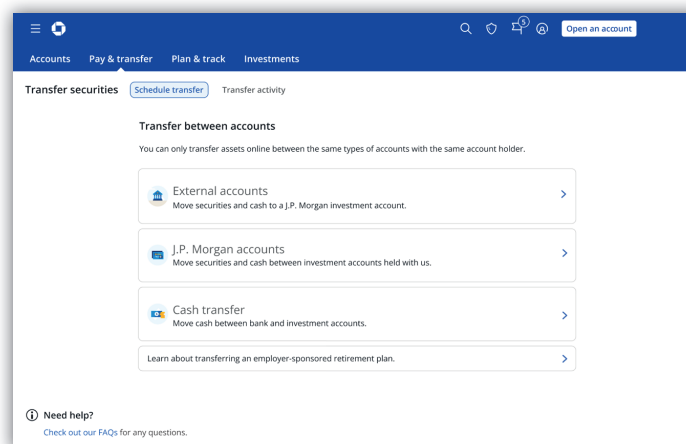
Getting started

1. After successfully logging in to your account, click on the **“Pay & transfer”** tab, then click on **“Transfer securities.”**

You can only transfer assets online between the same types of accounts with the same account holder, e.g. account titles must match.



2. If you're ready to begin your transfer, select the **“External accounts”** tile (skip to step 3). If you want to learn more about the transfer process, click on **“Check out our FAQs”** in the **“Need help?”** section of the page.



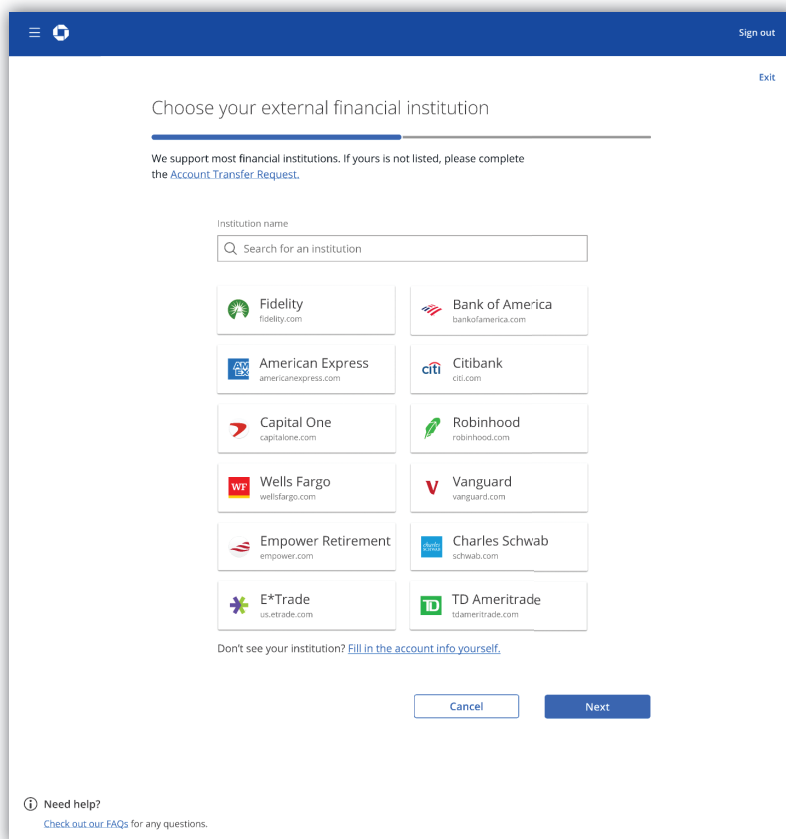
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- SUBJECT TO INVESTMENT RISKS, INCLUDING POSSIBLE LOSS OF THE PRINCIPAL AMOUNT INVESTED

3. Choose your **“External financial institution”** and follow the prompts to connect to your external accounts.

Note: You may be required to upload an account statement from the last 6 months to complete the account transfer.

4. Follow the prompts as directed until you reach the confirmation page.



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