

J.P. Morgan ACCESS® *Securities* Portal and iPad App

Frequently Asked Questions

PORTAL

Q: To access the new portal, do I need to change my log-on procedure?

A: No, there is no change to that secure process. You log in at jpmorganaccess.com the way you normally do, using your J.P. Morgan ACCESS® user ID and password.

Q: After logging in, will I automatically see the J.P. Morgan ACCESS® *Securities* dashboard, or do I have to access it differently?

A: New users may see the new interface immediately after logging in. Existing users, upon logging in, will find the current dashboard. In the left-column navigation, click on the “J.P. Morgan ACCESS Securities” link to launch the new interface.

Q: What features will I find on the new portal?

A: The first release of this new interface consists of four portlets that can be customized—two large views on the left side of your screen and two portlets to the right. If you currently utilize our performance, compliance and exposure products, you will see them along with other features such as market indices, reports from VIEWS Portfolio Reporting, and a securities lending summary. You’ll also find industry news and J.P. Morgan News Flashes.

Q: What if I use the performance product but not compliance?

A: Your personalized dashboard will adjust and display only the products to which you have entitlements. To learn about receiving additional products, please contact your J.P. Morgan relationship manager.

Q: How do I personalize the contents of a portlet?

A: To personalize a portlet, click on the drop-down menu in the upper left corner and select from the list shown. Also, you may choose to view the same product in more than one portlet. For example, you may wish to compare current performance in one portlet against historical performance in another. J.P. Morgan ACCESS *Securities* makes that easy.

Q: From the dashboard, how can I drill down to details?

A: With the performance, compliance and exposure products, you have the ability to drill down to a more detailed view by clicking the arrow in the upper right corner of the portlet. That action will launch an application view with additional graphics and functionality.

Q: From this new interface, how do I get to other ACCESS applications?

A: Go to “My Applications” at the top of your screen. In that drop-down menu, you can launch all underlying ACCESS applications to which you have entitlements.

Q: Are there training classes for the new portal?

A: We think that the new navigation is intuitive, but we understand that some users may have questions. You’ll find a comprehensive training module for J.P. Morgan ACCESS *Securities* in the Help section, which includes voice-overs, scripts and screen demonstrations. Or feel free to

reach out to a Help Desk in your region. Help Desk phone numbers can be found on the log-in page or on the portal under the Help menu.

Q: Is there a plan to add other features?

Yes. Our development process involves obtaining feedback from users to understand what works best for their needs. At this time we’re examining the requirements of our global client base, engaging them in dialogues and determining what will be included in the next releases to support custody, cash, fund accounting, securities lending and alternative investing, so that we deliver the most critical functionality first.

Q: Will you be retiring the current platform? If so, when?

Eventually the current version of J.P. Morgan ACCESS will be retired when core content and features are available on the new portal.

Q: Are there minimum specs required for the system to operate at peak efficiency?
Recommended

Processor: 1.2 GHz or higher
Operating System: Microsoft Windows 7
Physical RAM Installed: 512 MB RAM (minimum) 1GB RAM (optimal)
Hard Drive Capacity: 500 MB

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iPAD APPLICATION

Q: What will I find if I use this iPad app?

A: The first release of this new app offers executives and managers a dashboard with views of monthly performance along with custody summaries and the ability to drill-down for more robust detail. You'll also find recently run reports from the J.P. Morgan ACCESS portal.

Q: Do I need entitlements to use the iPad application?

A: If you currently use J.P. Morgan ACCESS and our performance analytics product, the iPad application will be available to you.

Q: How do I get the iPad application?

A: The new app is available on the App StoreSM. Download the application to your iPad. You will be asked to register your device; it's a very easy process.

Q: What ID and password do I use to log in to the new app?

A: You can use the same ID and password you currently use to log in at jpmorganaccess.com.

Q: Can I be signed into the portal and the iPad at the same time?

A: In accordance with ACCESS policy, you cannot log into ACCESS on multiple devices

(e.g., both portal and iPad) at the same time.

Q: How soon will I be timed out?

A: Time-outs are governed by the same security standards as the portal, which currently stand at 15 minutes.

Q: Does my device have to be approved by my company?

A: Please check with your company's Security Administrator to understand your company's policies regarding mobile device usage.

Q: Is it only available for the iPad or can I get it on my phone as well?

A: The first release of the J.P. Morgan ACCESS[®] *Securities* application is currently available only for use with iPads and the IOS system. (Look for other mobile device compatibility in future releases.)

Q: Is the app compatible with the newest iPad?

A: J.P. Morgan ACCESS *Securities* was developed for use with all generations of the iPad.

Q: How does the application protect my data security?

A: Helping to protect your information is a top priority for J.P. Morgan. The iPad app uses the same award-winning security employed by J.P. Morgan ACCESS via the web: RSA authentication protocol plus multifactor authentication requiring the user to register any new device. In order to further secure your information, the app will not store any data locally after the user has exited the application. We recommend the use of software on your device to protect it from viruses, malware, spyware and other threats.

Q: Will J.P. Morgan ACCESS *Securities* store any of my company's account information on my mobile device?

A. No, it will not.

Q: When will wider content become available?

A: The app's evolution and content will broaden based upon client need and demand. Look for greater functionality in future releases.

Q: What other mobile apps does J.P. Morgan offer?

A. Visit our mobile access web page, www.jpmorgan.com/mobile, for information about other J.P. Morgan apps.

For more information, please contact your J.P. Morgan ACCESS client service representative or your regional Help Desk. Help Desk phone numbers can be found on the log-in screen for J.P. Morgan ACCESS.

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