

Comprehensive Asset Servicing for Insurers

Helping insurers mitigate risk, realize efficiencies and enhance results, while balancing investment and regulatory requirements

J.P. Morgan is the premier provider of asset servicing solutions to meet the complex, evolving financial needs of the world's leading insurers. We offer insurers the benefits of a strong capital base and access to broad firmwide resources, including disciplined risk management, product innovation, operational excellence, global processing capabilities and a dedicated staff of top-tier service professionals.

KEY FEATURES AND BENEFITS

Feature	Benefits
Increase Efficiency	<ul style="list-style-type: none"> • Servicing the entire investment value chain for insurers across asset classes, infrastructures and global locations • Secure website (J.P. Morgan ACCESS®) enables insurers to efficiently initiate transactions, obtain real-time information and global reports, perform inquiries and use decision-support tools • Systems interfaces include CAMRA™, PAM, Bloomberg®, Aladdin, DST and proprietary platforms
Mitigate Risk	<ul style="list-style-type: none"> • Robust suite of investment analytics services to help insurers measure portfolio performance against peers, keep risk within desired levels, and detect and manage violations against NAIC and internal investment guidelines • Our global expertise and risk management discipline help insurers achieve enhanced results while balancing investment and regulatory requirements • Thought leadership and support to help insurers navigate the regulatory complexities associated with transparency, valuation and accounting standards
Enhance Returns	<ul style="list-style-type: none"> • Seamless integration with custody, securities lending and liquidity solutions to address the asset servicing needs of insurers worldwide • Universal bank model with broad capabilities to support the unique needs of insurers, including treasury services, investment management and investment banking

Highlights

- Heritage of commitment to insurers, serving the industry's needs since the early 1900s
- More than 200 U.S. insurance custody clients, representing \$1.3 trillion in assets
- Dedicated team of experienced relationship managers, product specialists and client coverage officers focused on serving the insurance industry
- Insurance industry-specific product development, conference sponsorships, client forums and Client Advisory Boards

Integrated capabilities include:

- General account, separate account, variable annuity and mutual fund services
- Collateral management services for both OTC and centrally-cleared derivatives
- Full suite of liquidity solutions
- Performance measurement, compliance and impairment reporting
- NAIC-approved short-term investment funds (STIFs)
- Alternative asset servicing, including derivatives, private equity, real estate and hedge funds
- Statutory deposit custody program
- Compliance with various state DOI regulations governing reinsurance trust accounts
- Centralized futures and options clearing

To learn more, please contact your relationship manager or visit us at jpmorgan.com/wss.

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