Chase Investment Services Corp., an investment firm with over 2,800 Financial Advisors located in Chase branches nationwide, is an affiliate of JPMorgan Chase & Co.—a leader in consumer financial services, investment banking and asset management.

Through a Chase Strategic Portfolio, you'll have strength and experience behind you and your financial goals.

Securities and investment advisory services are offered through Chase Investment Services Corp. (CISC). CISC, a member of FINRA and SIPC, is an affiliate of JPMorgan Chase Bank, N.A.

NOT FDIC INSURED  NO BANK GUARANTEE  MAY LOSE VALUE
With a Chase Strategic Portfolio, you'll benefit from an approach that helps you invest with more confidence and convenience. To learn more, schedule an appointment with your Financial Advisor to:

- Review your financial goals.
- Analyze how your current financial assets are held.
- Implement an investment strategy that is suited to your distinct financial needs.

A Customized Solution

The Chase Strategic Portfolio is a fee-based investment advisory program that brings together world-class investment management capabilities, people and processes to deliver an innovative investment experience you won't find anywhere else.

In a Chase Strategic Portfolio, your investment will be:

- Broadly diversified across multiple equity and fixed income asset classes to deliver an optimal portfolio of investments.
- Professionally managed and blended among a variety of investments to enhance returns while reducing risk and dependency on a single Investment Manager’s performance—a portfolio may include mutual funds, exchange traded funds, separately managed accounts and money market funds.
- Carefully constructed for your investment objective and consolidated into one comprehensive account.

CHASE STRATEGIC PORTFOLIO:

Multiple investment products working together in one convenient account.*

* Separately Managed Accounts are only available at certain investment levels.
Guidance

Experience leads to understanding. For over a century, JPMorgan Chase & Co. has been providing asset management solutions with insights that are proven and refined over various market cycles.

- Chase Investment Services has extensive experience in helping individuals understand their financial needs, analyzing how their current assets are held, and implementing a strategy that is suited to their distinct financial goals.

- J.P. Morgan Asset Management is one of the world’s leading investment management firms, with nearly $1.3 trillion in global assets under management. They bring their disciplined methodology and heritage as an industry leader and innovator.

The Chase Strategic Portfolio brings the powerful combination of these organizations together with a commitment to service excellence and individual attention that helps deliver the right results for each client.

Consultation

Every Chase Strategic Portfolio begins with an important conversation with your Chase Investment Services Financial Advisor who will work with you to identify your life goals, long-term financial needs and tolerance for investment risk.

- They will listen and gain an understanding of your total financial picture, including your near- and longer-term goals.

- Together, you will select from our 35 distinct investment portfolios to find the one designed for your unique financial goals.

Allocating Your Assets

The right asset allocation is one of the most important attributes of an investment portfolio. Based on your investment time horizon and risk tolerance, your Financial Advisor will assist you in selecting the appropriate mix of asset classes for your portfolio.

- They will listen and gain an understanding of your total financial picture, including your near- and longer-term goals.

- Together, you will select from our 35 distinct investment portfolios to find the one designed for your unique financial goals.

Monitoring Your Progress

Your Financial Advisor will meet with you periodically to discuss how your portfolio is performing relative to your goals and discuss changes in your financial situation whenever they occur. And you’ll always know where your investments stand with clear, consolidated performance reporting on a single statement. Key features of this account include:

- Continuous monitoring of the Chase Strategic Portfolio by J.P. Morgan Asset Management to help ensure the asset allocation of each portfolio remains in line with the portfolio’s objective.

- Ongoing Investment Manager evaluation by Chase Investment Services. Investment Managers can be replaced if they drift from their style or don’t live up to performance expectations.

Asset Allocation Models

- US Equity
- Non-US Equity
- Fixed Income & Cash

- Conservative
- Balanced
- Growth & Income
- Growth
- All Equity Aggressive
- All Equity Moderate
- 100% Fixed Income

Implementing Your Investment Strategy

Each Chase Strategic Portfolio benefits from the combined resources of J.P. Morgan Asset Management and Chase Investment Services:

- All transactions in your account are implemented by J.P. Morgan Asset Management.

- All Investment Managers are selected by Chase Investment Services based on a rigorous screening process, which favors long-term, risk-adjusted performance.

- Face-to-face meetings are conducted with every Investment Manager to look beyond the numbers.

1 J.P. Morgan Asset Management is the marketing name for the asset management business of JPMorgan Chase & Co., and its affiliates worldwide.

2 Participating in an asset allocation strategy does not assure or guarantee better performance and cannot eliminate the risk of investment loss. Past performance is not necessarily an indicator of future results.
Guidance

Experience leads to understanding. For over a century, JPMorgan Chase & Co. has been providing asset management solutions with insights that are proven and refined over various market cycles.

- Chase Investment Services has extensive experience in helping individuals understand their financial needs, analyzing how their current assets are held, and implementing a strategy that is suited to their distinct financial goals.

- J.P. Morgan Asset Management is one of the world’s leading investment management firms, with nearly $1.3 trillion in global assets under management. They bring their disciplined methodology and heritage as an industry leader and innovator.

The Chase Strategic Portfolio brings the powerful combination of these organizations together with a commitment to service excellence and individual attention that helps deliver the right results for each client.

Consultation

Every Chase Strategic Portfolio begins with an important conversation with your Chase Investment Services Financial Advisor who will work with you to identify your life goals, long-term financial needs and tolerance for investment risk.

- They will listen and gain an understanding of your total financial picture, including your near- and longer-term goals.
- Together, you will select from our 35 distinct investment portfolios to find the one designed for your unique financial goals.

Allocating Your Assets

The right asset allocation is one of the most important attributes of an investment portfolio. Based on your investment time horizon and risk tolerance, your Financial Advisor will assist you in selecting the appropriate mix of asset classes for your portfolio.

With Chase Strategic Portfolio, you can invest with the confidence of knowing that your asset allocation strategy is determined by experienced Chase Investment Services professionals who have the knowledge and sophisticated resources necessary to analyze, select and monitor your investments.

- Chase Strategic Portfolio models are constructed based on risk analyses and historical asset class returns.
- Chase Strategic Portfolio delivers multiple asset classes to optimize the balance between risk and reward.

Implementing Your Investment Strategy

Each Chase Strategic Portfolio benefits from the combined resources of J.P. Morgan Asset Management and Chase Investment Services:

- All transactions in your account are implemented by J.P. Morgan Asset Management.
- All Investment Managers are selected by Chase Investment Services based on a rigorous screening process, which favors long-term, risk-adjusted performance.
- Face-to-face meetings are conducted with every Investment Manager to look beyond the numbers.

Monitoring Your Progress

Your Financial Advisor will meet with you periodically to discuss how your portfolio is performing relative to your goals and discuss changes in your financial situation whenever they occur. And you’ll always know where your investments stand with clear, consolidated performance reporting on a single statement. Key features of this account include:

- Continuous monitoring of the Chase Strategic Portfolio by J.P. Morgan Asset Management to help ensure the asset allocation of each portfolio remains in line with the portfolio’s objective.
- Ongoing Investment Manager evaluation by Chase Investment Services. Investment Managers can be replaced if they drift from their style or don’t live up to performance expectations.

1 J.P. Morgan Asset Management is the marketing name for the asset management business of JPMorgan Chase & Co., and its affiliates worldwide.

2 Participating in an asset allocation strategy does not assure or guarantee better performance and cannot eliminate the risk of investment loss. Past performance is not necessarily an indicator of future results.
With a Chase Strategic Portfolio, you’ll benefit from an approach that helps you invest with more confidence and convenience. To learn more, schedule an appointment with your Financial Advisor to:

- Review your financial goals.
- Analyze how your current financial assets are held.
- Implement an investment strategy that is suited to your distinct financial needs.

A Customized Solution

The Chase Strategic Portfolio is a fee-based investment advisory program that brings together world-class investment management capabilities, people and processes to deliver an innovative investment experience you won’t find anywhere else.

In a Chase Strategic Portfolio, your investment will be:

- Broadly diversified across multiple equity and fixed income asset classes to deliver an optimal portfolio of investments.
- Professionally managed and blended among a variety of investments to enhance returns while reducing risk and dependency on a single Investment Manager’s performance—a portfolio may include mutual funds, exchange traded funds, separately managed accounts and money market funds.
- Carefully constructed for your investment objective and consolidated into one comprehensive account.

CHASE STRATEGIC PORTFOLIO:

Multiple investment products working together in one convenient account.

* Separately Managed Accounts are only available at certain investment levels.
Chase Investment Services Corp., an investment firm with over 2,800 Financial Advisors located in Chase branches nationwide, is an affiliate of JPMorgan Chase & Co.—a leader in consumer financial services, investment banking and asset management. Through a Chase Strategic Portfolio, you’ll have strength and experience behind you and your financial goals.

Securities and investment advisory services are offered through Chase Investment Services Corp. (CISC). CISC, a member of FINRA and SIPC, is an affiliate of JPMorgan Chase Bank, N.A.