

J.P.Morgan

ESCROW DIRECT

Making it simpler to engage, track and
manage escrow accounts



Get ready for a dynamic transformation in the way you do business . . .



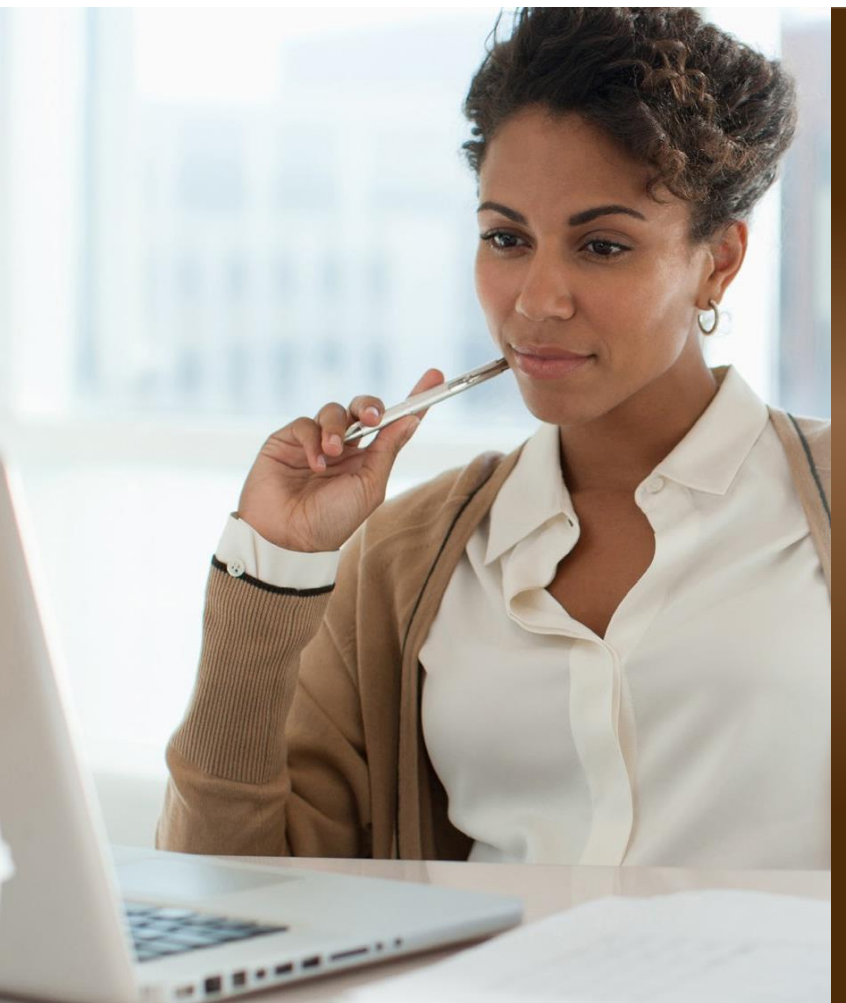
It's a fact:

Our clients expressed the need for a faster, more streamlined way to engage, track and manage their escrow accounts. We listened.



The result:

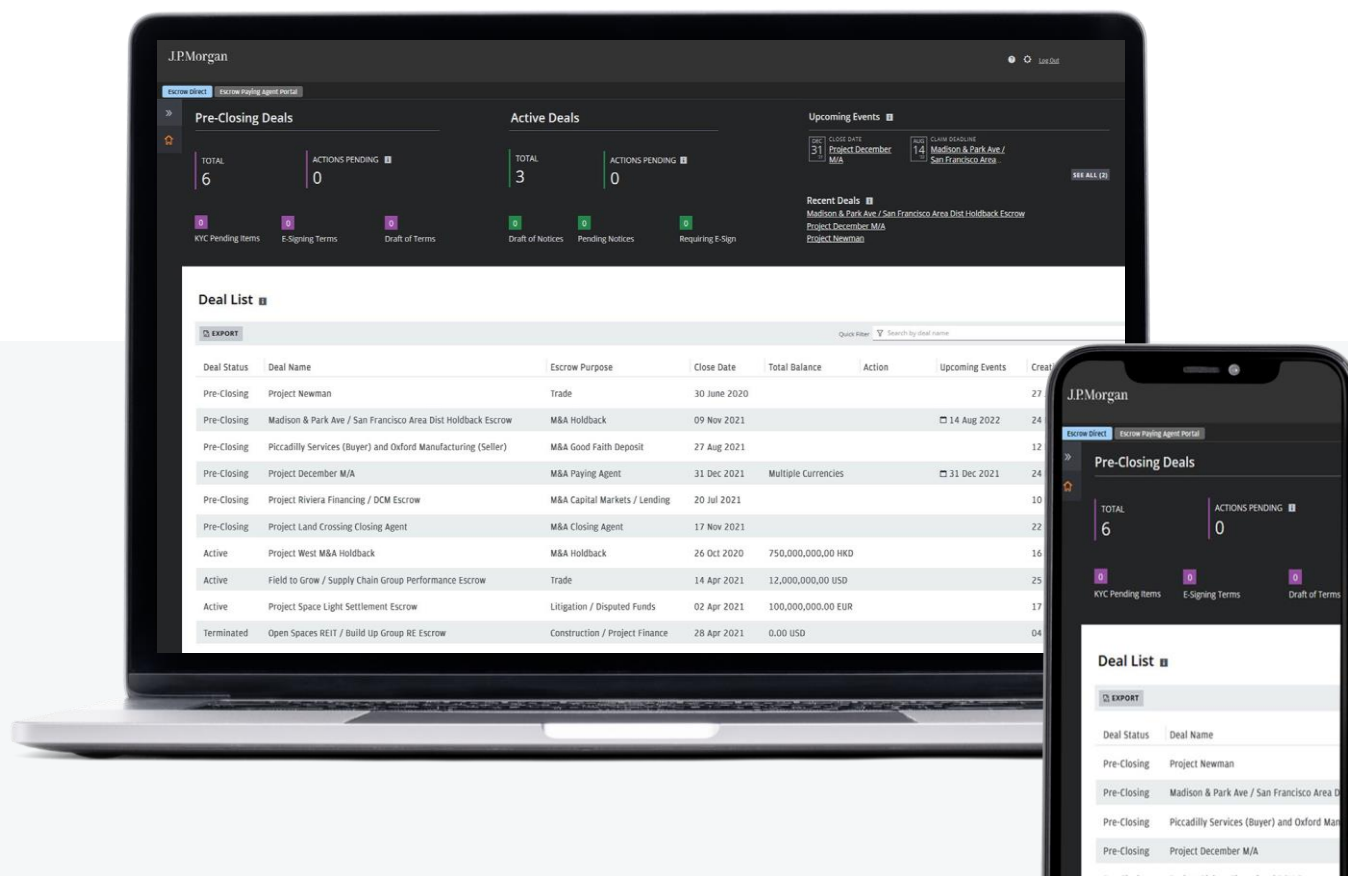
Escrow Direct – a future-ready platform that can drive your business's escrow efficiencies.



Escrow Direct
Simpler for you

Link = <https://escrow.portal.jpmorgan.com/>

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WATCH VIDEO

Access data fast with a dashboard customized for the way you do business

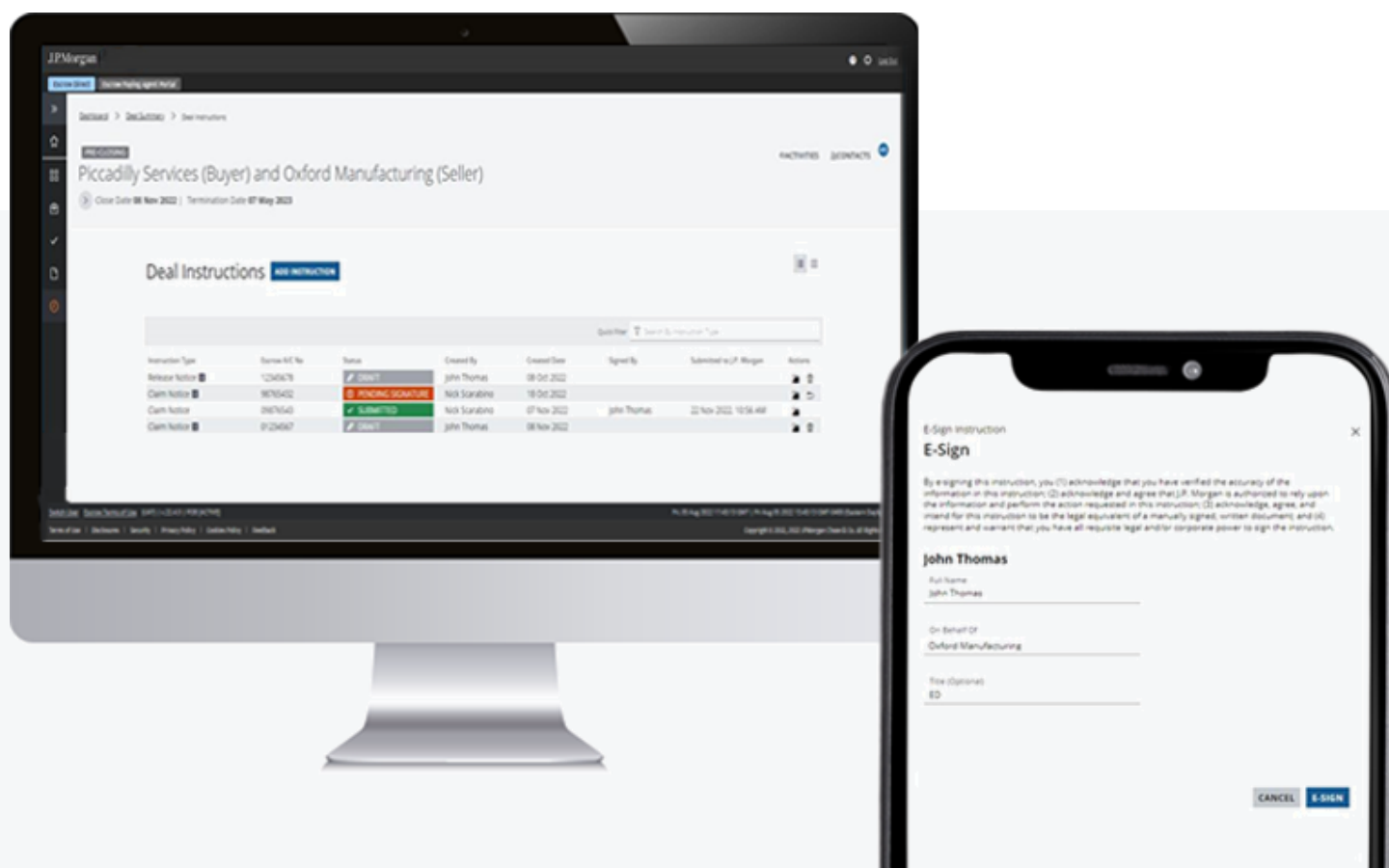
Having the information you need when you need it is crucial to your efficiency. Our user-friendly Escrow Direct dashboard is designed to provide you with a centralized view of all your deals and real-time status updates. With it, you can:

- View your pre-closing, active and terminated escrow deals
- Check account balances and download statements across all deals globally
- View and edit your deal details, including close dates, deal team contacts, contracting parties and more
- Stay informed by adding milestone events for key dates and setting up Outlook and email reminders
- Access your data 24/7, including on mobile devices
- Continue to have full access to your local, dedicated Escrow team, who will support you from start to finish
- Connect counterparties and their intermediaries and attorneys for all deals in any J.P. Morgan escrow account location
- Cybersecurity controls you can trust to keep your and your partners' confidential data safe and secure

Create, e-sign and submit payments, claims and other escrow deal instructions

From gathering instruction details to managing document execution with e-sign, Escrow Direct streamlines the process from start to finish. Select from three options to quickly create new deal instructions using a simple and secure step-by-step guided approach.

- Quickly build your deal instructions from scratch using pre-defined templates or upload prepared instructions
- Speed up inputting details with pre-populating data and reduce manual entry errors
- Automate document execution with e-sign to sign anytime, anywhere
- Transmit instructions securely without reliance on emails
- Use as a repository to store past instructions



See the Feature in Action

Submit sensitive, confidential KYC information securely

Escrow Direct simplifies the KYC process. Avoid back-and-forth emails while giving all deal team participants oversight of the process 24x7.

- Save time by only receiving information requests that J.P. Morgan does not already have on file
- View tips and guidance to ensure submissions are correct, comprehensive, and quick-to-complete
- Input answers yourself or delegate to other deal team participants to input or review your inputs
- Track which questions are requested or submitted / complete for all counterparties
- Use as a repository to store past KYC, including an audit trail of who and when submitted

Easy to understand and complete

Questions will contain a mix of free form text, checkboxes, drag-and-drop uploads, and radio buttons, as well as tool tips and directions to help you fill out correctly.

The screenshot shows a 'Tax Form' section with a 'REQUESTED' status indicator. It includes instructions to upload IRS Form W-9 or Form W-8 and a link to a help document. A large dashed box contains an upload icon and the text 'Drop files here or BROWSE FILES'. Below this, it states 'Document upload is required - Accepts all file types with a 20 MB limit per file.' At the bottom, there are buttons for 'CANCEL', 'EXPORT KYC QUESTIONNAIRE (PDF)', 'SAVE', and 'SUBMIT'.

Real-time KYC status

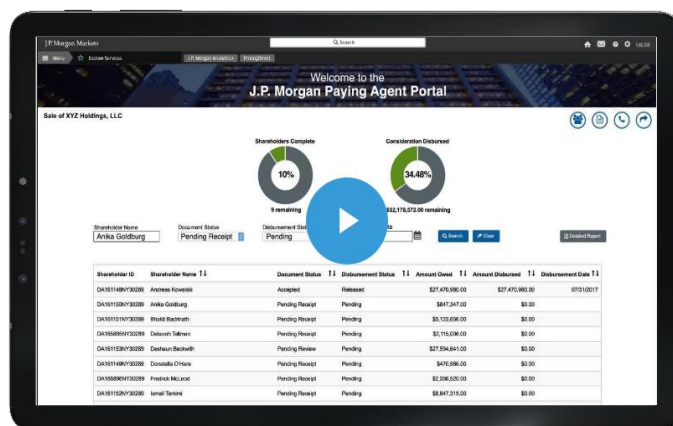
Track KYC status for all counterparties and all active deals in one place.



The screenshot shows the 'KYC Questionnaire Status' dashboard. It displays two cards for counterparties: 'Initech Holdings DEPOSITOR' and 'Soylent Corp DEPOSITOR'. The Initech card shows a 'SUBMITTED' status with a green checkmark icon and the text 'Submitted'. The Soylent Corp card shows a 'REQUESTED' status with a red circle containing the number 8 and the text 'Requested', and a blue circle containing the number 0 and the text 'Submitted'. Both cards have a 'SELECT' button at the bottom.

Take advantage of our Paying Agent Portal

- Paying shareholders of an acquired company in exchange for share certificates can be a complex and tedious process.
- While some escrow providers in the industry are stepping back from this service, J.P. Morgan has made investments in our people, process and technology that will ultimately enhance your Paying Agent experience



- To further enhance your online experience, Escrow Direct gives you fast and easy access to our Paying Agent Portal, featuring:

- ✓ **Client Tracker:** Providing you with real-time transparency into shareholder status across all deals
- ✓ **Shareholder Portal:** A simple and secure way for shareholders to submit required documents that reduces processing errors and accelerates payments



This is just the beginning . . .

As we continue to enhance Escrow Direct, it will serve as a complete digital escrow solution for your pre-close and post-close activities in the life cycle of an escrow transaction.

Accelerate your escrow business with the strength of a global bank

J.P. Morgan is a leading global escrow service provider with extensive capabilities and a history of success. As one of the world's largest full-service providers, J.P. Morgan delivers cash management, liquidity and escrow services that help clients resolve the working capital and efficiency challenges they face today. On a daily basis, J.P. Morgan moves nearly \$10 trillion in over 120 currencies and more than 160 countries.

\$600⁺B

in escrow and liquidity deposits

2,600⁺

active escrow transactions

1,400⁺

new escrow mandates

100⁺

experienced global escrow professionals

As of June 30, 2025



Escrow Direct can make business simpler for you. Contact your J.P. Morgan Escrow Services representative today or visit us at

jpmorgan.com/escrow

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