Global Tactical Asset Allocation Strategy Series

WealthPlan

SUITE OF SOLUTIONS AVAILABLE

Wealth Plan Global Tactical Asset Allocation Portfolios

Tactical

Globally diversified, actively managed portfolios designed to capture short-term market opportunities.

Tactical Tax-Aware

The same benefits as the Tactical models, but with the inclusion of municipal bonds.

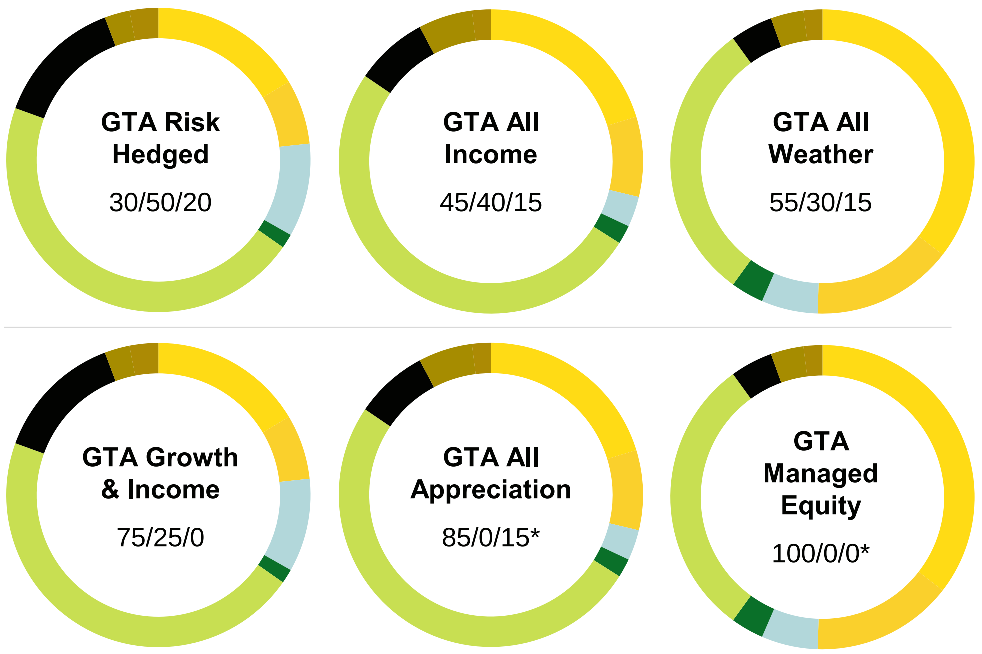
Globally diversified to seek attractive opportunities across asset classes over the near-term.

Active portfolio management offers flexibility to adjust portfolio allocations when the facts change.

Constructed with a blend of active and passive strategies to access a broad range of asset classes and manager expertise.

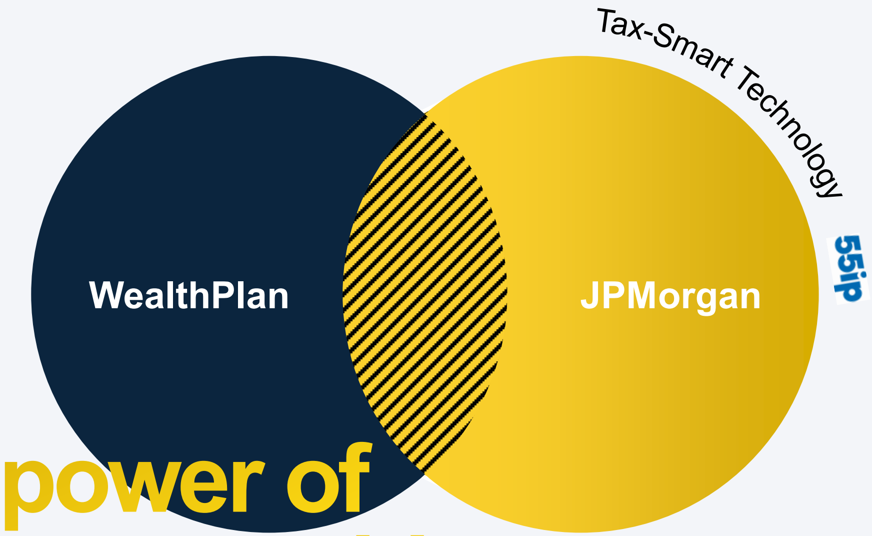
Available across the risk spectrum to meet a variety of goals, from preserving capital to growing wealth.

Suite of portfolios ranging from conservative to aggressive



Source: J.P. Morgan Asset Management, for illustrative purposes only. The Advisor is solely responsible for (a) any modifications made to a J.P. Morgan Model and any resulting Custom Model, (b) the selection of the appropriate share classes, (c) the selection, due diligence and on-going monitoring of any investments directed for inclusion in the Custom Model by the Advisor, and (d) any investments recommended by J.P. Morgan to the Advisor at the Advisor's request, according to criteria or guidelines as dictated by the Advisor. Such modifications and investments shall be the sole responsibility of the Adviser and approved by the Advisor. J.P. Morgan has no responsibility for the initial selection, due diligence, ongoing monitoring or performance of investments directed or requested by the Advisor for inclusion in the model. *Tax-Aware models not available for 85/0/15 and 100/0/0

Adding value with a dynamic partnership and time-tested team



The power of The partnership

Insights from J.P. Morgan Multi-Asset Solutions[1]

Time-tested Team

J.P. Morgan's Multi-Asset Solution's team has over a decade of experience managing models that are designed to solve your clients' investment needs.

J.P. Morgan Asset Management

100+ multi-asset experts

with access to 550+ investment strategies firmwide

50+ year
Track record running multi-asset solutions

$454B
Assets Under Supervision

1300+
Investment Professionals Firmwide

Source: J.P. Morgan Asset Management, as of 11/30/24. Investment professionals include portfolio managers, research analysts, traders and investment specialists, VP or above. AUS includes both Multi-Asset Solutions and Beta assets.

WEALTHPLAN INVESTMENT MANAGEMENT | J.P.Morgan ASSET MANAGEMENT

Our investment approach

The answer is **active**

Active Asset Allocation

These are not static portfolios – when the facts change, we can adjust our allocations

Active Investment Selection

Active selection of strategies – including active, passive and factor-based mutual funds and/or ETFs

Active Insights

Delivering our insights to clients through diversified portfolios, supported by our tools & resources

Key Investment Themes

As of January 2025

Latest investment themes

ECONOMY

Resilient backdrop

Consumer spending remains strong, businesses continue to feel confident

- Pro-growth policies expected to maintain economic momentum in 2025
- Healthy consumer spending and earnings growth set to uphold US exceptionalism

EQUITIES

All roads lead to home

US earnings continue to broaden out, expanding beyond large cap equities

- Preference for high-quality US equities, monitoring opportunities outside US
- Diversifying equities through balance in market cap and style exposures

FIXED INCOME

Opportunistic in credit

Macroeconomic backdrops supports extended credit paired with core bonds for diversification

- Low default probabilities with attractive all-in yields supports extended credit
- Anchoring portfolios with core bonds to provide steady stream of income and manage risk

INVESTMENT PRINCIPLES

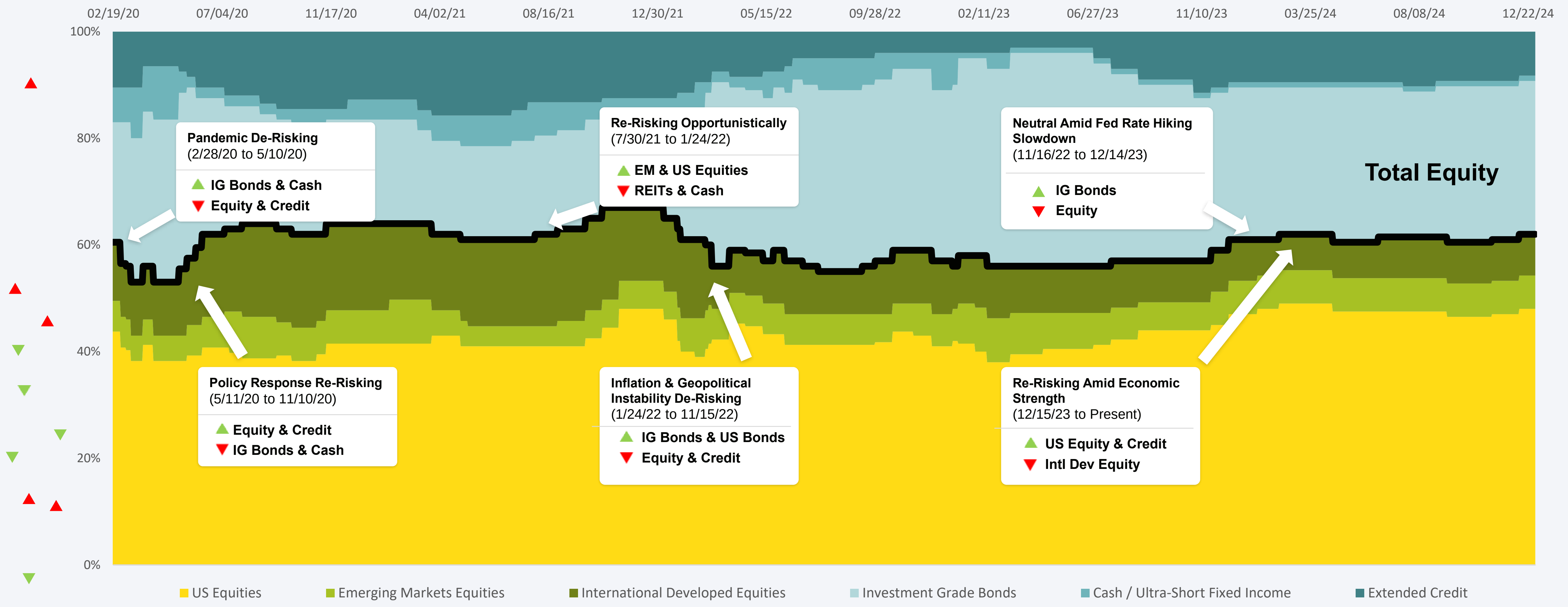
Navigating peaks & valleys

The rate cutting cycle is underway, but risk remains around the path of inflation and policy

- Remain diversified and lean into active managers
- It's about time in the market, not timing the market

Source: J.P. Morgan Asset Management. For illustrative purposes only. Forecasts, projections and other forward-looking statements are based upon current beliefs and expectations. They are for illustrative purposes only and serve as an indication of what may occur. Given the inherent uncertainties and risks associated with forecasts, projections and other forward statements, actual events, results or performance may differ materially from those reflected or contemplated.

Active asset allocation is a key lever for offense and defense



Source: J.P. Morgan Asset Management. Allocation data ranges from 02/19/20 to 12/31/24. Allocations reflect a representative account and are shown for illustrative purposes only. Represents positioning for the Moderate model. Should not be considered a recommendation to buy or sell a particular security or asset class. Depending on market conditions, allocation percentages and/or underlying funds are subject to change without notice.

As of March 1, 2025

WP GTA All Weather (55/30/15) Model

Asset Class/Product	Ticker	Net Expense Ratio	WP GTA All Weather (55/30/15)
Total Equity			**58.00%**
Total US Equity			**39.00%**
WisdomTree US Earnings 500 ETF	EPS	0.08%	7.00%
JPMorgan BetaBuilders US Equity ETF	BBUS	0.02%	16.00%
JPMorgan Active Growth ETF	JGRO	0.44%	4.25%
JPMorgan Active Value ETF	JAVA	0.44%	6.75%
JPMorgan Small & Mid Cap Enh Eq ETF	JMEE	0.24%	5.00%
Total Global Equity			**6.50%**
JPMorgan Global Select Equity ETF	JGLO	0.47%	6.50%
Total International Equity			**12.50%**
Lazard Emerging Markets Core Equity Inst	ECEIX	1.10%	2.25%
Avantis Emerging Markets Equity ETF	AVEM	0.33%	2.25%
JPMorgan International Rsrch Enh Eq ETF	JIRE	0.24%	8.00%
Total Fixed Income			**25.00%**
Total Core Bonds			**14.50%**
Avantis Core Fixed Income ETF	AVIG	0.15%	4.75%
JPMorgan Core Plus Bond ETF	JCPB	0.38%	4.75%
iShares 10-20 Year Treasury Bond ETF	TLH	0.15%	5.00%
Total Extended Credit			**10.50%**
JPMorgan BetaBuilders $ HY Corp Bnd ETF	BBHY	0.07%	2.50%
Aristotle Strategic Income I	PLSRX	0.59%	5.50%
Regan Total Return Income Institutional	RCIRX	1.31%	2.50%
Total Alternatives			**15.00%**
Longboard I	LONGX	1.99%	2.00%
JPMorgan Unconstrained Debt I	JSISX	0.65%	5.00%
JPMorgan Research Market Neutral I	JMNSX	0.69%	4.00%
JPMorgan Hedged Equity Ldrd Ovrly ETF	HELO	0.50%	4.00%
Total Cash*			**2.00%**
Adjusted weighted average net expense ratio[1]			0.37%
Weighted average net expense ratio[1]			0.45%

Portfolio Positioning & Themes:

Resilient backdrop

Strong consumer spending, business confidence, and pro-growth policies expected to sustain US momentum

All roads lead to home

Preference for high-quality diversified US equities; opportunistic in international markets

Opportunistic in credit

Macro backdrop supports extended credit paired with core bonds for diversification

Navigating peaks & valleys

Remain diversified, lean into active managers, and stay invested

Source: J.P. Morgan Asset Management. 1Reflects the weighted average net expense ratio of the models sourced from Morningstar, excluding cash. Note: Fees for JPMorgan Research Market Neutral reflect the adjusted net expense ratio of 0.69% vs. prospectus net expense ratio of 2.64%. For illustrative purposes only. Depending on market conditions, allocation percentages and/or underlying funds are subject to change without notice.. Cash vehicle dependent on custodial platform. The Advisor is solely responsible for (a) any modifications made to a J.P. Morgan Model and any resulting Custom Model, (b) the selection of the appropriate share classes, (c) the selection, due diligence and on-going monitoring of any investments directed for inclusion in the Custom Model by the Advisor, and (d) any investments recommended by J.P. Morgan to the Advisor at the Advisor's request, according to criteria or guidelines as dictated by the Advisor. Such modifications and investments shall be the sole responsibility of the Adviser and approved by the Advisor. J.P. Morgan has no responsibility for the initial selection, due diligence, ongoing monitoring or performance of investments directed or requested by the Advisor for inclusion in the model.

As of March 1, 2025

WealthPlan Global Tactical Asset Allocation Models

Asset Class/Product	Ticker	Net Expense Ratio	WP GTA Risk Hedged (30/50/20)	WP GTA All Income (45/40/15)	WP GTA All Weather (55/30/15)	WP GTA Growth & Income (75/25/0)	WP GTA All Appreciation (85/0/15)	WP GTA Managed Equity (100/0/0)
Total Equity			**33.00%**	**48.00%**	**58.00%**	**78.00%**	**87.00%**	**98.00%**
Total US Equity			**22.25%**	**32.75%**	**39.00%**	**51.50%**	**57.00%**	**64.50%**
WisdomTree US Earnings 500 ETF	EPS	0.08%	4.75%	6.00%	7.00%	9.50%	10.25%	11.75%
JPMorgan BetaBuilders US Equity ETF	BBUS	0.02%	9.75%	14.50%	16.00%	22.00%	24.50%	27.00%
JPMorgan Active Growth ETF	JGRO	0.44%	2.25%	3.50%	4.25%	5.75%	6.25%	7.25%
JPMorgan Active Value ETF	JAVA	0.44%	2.75%	4.75%	6.75%	8.25%	9.00%	10.50%
JPMorgan Small & Mid Cap Enh Eq ETF	JMEE	0.24%	2.75%	4.00%	5.00%	6.00%	7.00%	8.00%
Total Global Equity			**3.75%**	**5.25%**	**6.50%**	**8.75%**	**9.50%**	**11.00%**
JPMorgan Global Select Equity ETF	JGLO	0.47%	3.75%	5.25%	6.50%	8.75%	9.50%	11.00%
Total International Equity			**7.00%**	**10.00%**	**12.50%**	**17.75%**	**20.50%**	**22.50%**
Lazard Emerging Markets Core Equity Inst	ECEIX	1.10%	-	1.75%	2.25%	3.00%	3.50%	4.00%
Avantis Emerging Markets Equity ETF	AVEM	0.33%	2.50%	1.75%	2.25%	3.00%	3.50%	4.00%
JPMorgan International Rsrch Enh Eq ETF	JIRE	0.24%	4.50%	6.50%	8.00%	11.75%	13.50%	14.50%
Total Fixed Income			**45.00%**	**35.00%**	**25.00%**	**20.00%**	**-**	**-**
Total Core Bonds			**26.50%**	**20.50%**	**14.50%**	**11.50%**	**-**	**-**
Avantis Core Fixed Income ETF	AVIG	0.15%	8.75%	6.75%	4.75%	3.75%	-	-
JPMorgan Core Plus Bond ETF	JCPB	0.38%	8.75%	6.75%	4.75%	3.75%	-	-
iShares 10-20 Year Treasury Bond ETF	TLH	0.15%	9.00%	7.00%	5.00%	4.00%	-	-
Total Extended Credit			**18.50%**	**14.50%**	**10.50%**	**8.50%**	**-**	**-**
JPMorgan BetaBuilders $ HY Corp Bnd ETF	BBHY	0.07%	5.25%	3.25%	2.50%	2.00%	-	-
Aristotle Strategic Income I	PLSRX	0.59%	9.75%	8.25%	5.50%	4.50%	-	-
Regan Total Return Income Institutional	RCIRX	1.31%	3.50%	3.00%	2.50%	2.00%	-	-
Total Alternatives			**20.00%**	**15.00%**	**15.00%**	**-**	**11.00%**	**-**
Longboard I	LONGX	1.99%	2.00%	2.00%	2.00%	-	2.00%	-
JPMorgan Unconstrained Debt I	JSISX	0.65%	7.00%	5.00%	5.00%	-	3.00%	-
JPMorgan Research Market Neutral I	JMNSX	0.69%	5.50%	4.00%	4.00%	-	3.00%	-
JPMorgan Hedged Equity Ldrd Ovrly ETF	HELO	0.50%	5.50%	4.00%	4.00%	-	3.00%	-
Total Cash*			**2.00%**	**2.00%**	**2.00%**	**2.00%**	**2.00%**	**2.00%**
Adjusted weighted average net expense ratio[1]			0.39%	0.38%	0.37%	0.28%	0.32%	0.26%
Weighted average net expense ratio[1]			0.50%	0.45%	0.45%	0.28%	0.38%	0.26%

Source: J.P. Morgan Asset Management. 1Reflects the weighted average net expense ratio of the models sourced from Morningstar, excluding cash. Note: Fees for JPMorgan Research Market Neutral reflect the adjusted net expense ratio of 0.69% vs. prospectus net expense ratio of 2.64%. For illustrative purposes only. Depending on market conditions, allocation percentages and/or underlying funds are subject to change without notice.. Cash vehicle dependent on custodial platform. The Advisor is solely responsible for (a) any modifications made to a J.P. Morgan Model and any resulting Custom Model, (b) the selection of the appropriate share classes, (c) the selection, due diligence and on-going monitoring of any investments directed for inclusion in the Custom Model by the Advisor, and (d) any investments recommended by J.P. Morgan to the Advisor at the Advisor's request, according to criteria or guidelines as dictated by the Advisor. Such modifications and investments shall be the sole responsibility of the Adviser and approved by the Advisor. J.P. Morgan has no responsibility for the initial selection, due diligence, ongoing monitoring or performance of investments directed or requested by the Advisor for inclusion in the model.

As of March 1, 2025

WP GTA Tax-Aware All-Weather Model (55/30/15)

Asset Class/Product	Ticker	Net Expense Ratio	WP GTA Tax-Aware All-Weather Model (55/30/15)
Total Equity			**58.00%**
Total US Equity			**39.00%**
WisdomTree US Earnings 500 ETF	EPS	0.08%	7.00%
JPMorgan BetaBuilders US Equity ETF	BBUS	0.02%	16.00%
JPMorgan Active Growth ETF	JGRO	0.44%	4.25%
JPMorgan Active Value ETF	JAVA	0.44%	6.75%
JPMorgan Small & Mid Cap Enh Eq ETF	JMEE	0.24%	5.00%
Total Global Equity			**6.50%**
JPMorgan Global Select Equity ETF	JGLO	0.47%	6.50%
Total International Equity			**12.50%**
Lazard Emerging Markets Core Equity Inst	ECEIX	1.10%	2.25%
Avantis Emerging Markets Equity ETF	AVEM	0.33%	2.25%
JPMorgan International Rsrch Enh Eq ETF	JIRE	0.24%	8.00%
Total Fixed Income			**25.00%**
Total Core Bonds			**20.50%**
VanEck Short Muni ETF	SMB	0.15%	2.00%
Goldman Sachs Municipal Income ETF	GMUB	0.18%	8.75%
JPMorgan Municipal ETF	JMUB	0.18%	9.75%
Total Extended Credit			**4.50%**
VanEck High Yield Muni ETF	HYD	0.32%	4.50%
Total Alternatives			**15.00%**
Longboard I	LONGX	1.99%	2.00%
JPMorgan Unconstrained Debt I	JSISX	0.65%	5.00%
JPMorgan Research Market Neutral I	JMNSX	0.69%	4.00%
JPMorgan Hedged Equity Ldrd Ovrly ETF	HELO	0.50%	4.00%
Total Cash*			**2.00%**
Adjusted weighted average net expense ratio[1]			0.32%
Weighted average net expense ratio[1]			0.40%

Portfolio Positioning & Themes:

Resilient backdrop

Strong consumer spending, business confidence, and pro-growth policies expected to sustain US momentum

All roads lead to home

Preference for high-quality diversified US equities; opportunistic in international markets

Opportunistic in credit

Macro backdrop supports extended credit paired with core bonds for diversification

Navigating peaks & valleys

Remain diversified, lean into active managers, and stay invested

Source: J.P. Morgan Asset Management. [1]Reflects the weighted average net expense ratio of the models sourced from Morningstar, excluding cash. Note: Fees for JPMorgan Research Market Neutral reflect the adjusted net expense ratio of 0.69% vs. prospectus net expense ratio of 2.64%. For illustrative purposes only. Depending on market conditions, allocation percentages and/or underlying funds are subject to change without notice. Cash vehicle dependent on custodial platform. The Advisor is solely responsible for (a) any modifications made to a J.P. Morgan Model and any resulting Custom Model, (b) the selection of the appropriate share classes, (c) the selection, due diligence and on-going monitoring of any investments directed for inclusion in the Custom Model by the Advisor, and (d) any investments recommended by J.P. Morgan to the Advisor at the Advisor's request, according to criteria or guidelines as dictated by the Advisor. Such modifications and investments shall be the sole responsibility of the Adviser and approved by the Advisor. J.P. Morgan has no responsibility for the initial selection, due diligence, ongoing monitoring or performance of investments directed or requested by the Advisor for inclusion in the model.

As of March 1, 2025

WealthPlan Global Tactical Asset Allocation Tax-Aware Models

Asset Class/Product	Ticker	Net Expense Ratio	WP GTA Tax-Aware Risk Hedged Model (30/50/20)	WP GTA Tax-Aware All Income Model (45/40/15)	WP GTA Tax-Aware All-Weather Model (55/30/15)	WP GTA Tax-Aware Growth & Income Model (75/25/0)
Total Equity			**33.00%**	**48.00%**	**58.00%**	**78.00%**
Total US Equity			**22.25%**	**32.75%**	**39.00%**	**51.50%**
WisdomTree US Earnings 500 ETF	EPS	0.08%	4.75%	6.00%	7.00%	9.50%
JPMorgan BetaBuilders US Equity ETF	BBUS	0.02%	9.75%	14.50%	16.00%	22.00%
JPMorgan Active Growth ETF	JGRO	0.44%	2.25%	3.50%	4.25%	5.75%
JPMorgan Active Value ETF	JAVA	0.44%	2.75%	4.75%	6.75%	8.25%
JPMorgan Small & Mid Cap Enh Eq ETF	JMEE	0.24%	2.75%	4.00%	5.00%	6.00%
Total Global Equity			**3.75%**	**5.25%**	**6.50%**	**8.75%**
JPMorgan Global Select Equity ETF	JGLO	0.47%	3.75%	5.25%	6.50%	8.75%
Total International Equity			**7.00%**	**10.00%**	**12.50%**	**17.75%**
Lazard Emerging Markets Core Equity Inst	ECEIX	1.10%	-	1.75%	2.25%	3.00%
Avantis Emerging Markets Equity ETF	AVEM	0.33%	2.50%	1.75%	2.25%	3.00%
JPMorgan International Rsrch Enh Eq ETF	JIRE	0.24%	4.50%	6.50%	8.00%	11.75%
Total Fixed Income			**45.00%**	**35.00%**	**25.00%**	**20.00%**
Total Core Bonds			**39.50%**	**30.00%**	**20.50%**	**16.00%**
VanEck Short Muni ETF	SMB	0.15%	3.00%	2.50%	2.00%	1.50%
Goldman Sachs Municipal Income ETF	GMUB	0.18%	17.50%	12.50%	8.75%	8.00%
JPMorgan Municipal ETF	JMUB	0.18%	19.00%	15.00%	9.75%	6.50%
Total Extended Credit			**5.50%**	**5.00%**	**4.50%**	**4.00%**
VanEck High Yield Muni ETF	HYD	0.32%	5.50%	5.00%	4.50%	4.00%
Total Alternatives			**20.00%**	**15.00%**	**15.00%**	**-**
Longboard I	LONGX	1.99%	2.00%	2.00%	2.00%	-
JPMorgan Unconstrained Debt I	JSISX	0.65%	7.00%	5.00%	5.00%	-
JPMorgan Research Market Neutral I	JMNSX	0.69%	5.50%	4.00%	4.00%	-
JPMorgan Hedged Equity Ldrd Ovrly ETF	HELO	0.50%	5.50%	4.00%	4.00%	-
Total Cash*			**2.00%**	**2.00%**	**2.00%**	**2.00%**
Adjusted weighted average net expense ratio[1]			0.31%	0.31%	0.32%	0.24%
Weighted average net expense ratio[1]			0.43%	0.39%	0.40%	0.25%

Source: J.P. Morgan Asset Management. 1Reflects the weighted average net expense ratio of the models sourced from Morningstar, excluding cash. Note: Fees for JPMorgan Research Market Neutral reflect the adjusted net expense ratio of 0.69% vs. prospectus net expense ratio of 2.64%. For illustrative purposes only. Depending on market conditions, allocation percentages and/or underlying funds are subject to change without notice.. Cash vehicle dependent on custodial platform. The Advisor is solely responsible for (a) any modifications made to a J.P. Morgan Model and any resulting Custom Model, (b) the selection of the appropriate share classes, (c) the selection, due diligence and on-going monitoring of any investments directed for inclusion in the Custom Model by the Advisor, and (d) any investments recommended by J.P. Morgan to the Advisor at the Advisor's request, according to criteria or guidelines as dictated by the Advisor. Such modifications and investments shall be the sole responsibility of the Adviser and approved by the Advisor. J.P. Morgan has no responsibility for the initial selection, due diligence, ongoing monitoring or performance of investments directed or requested by the Advisor for inclusion in the model.

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