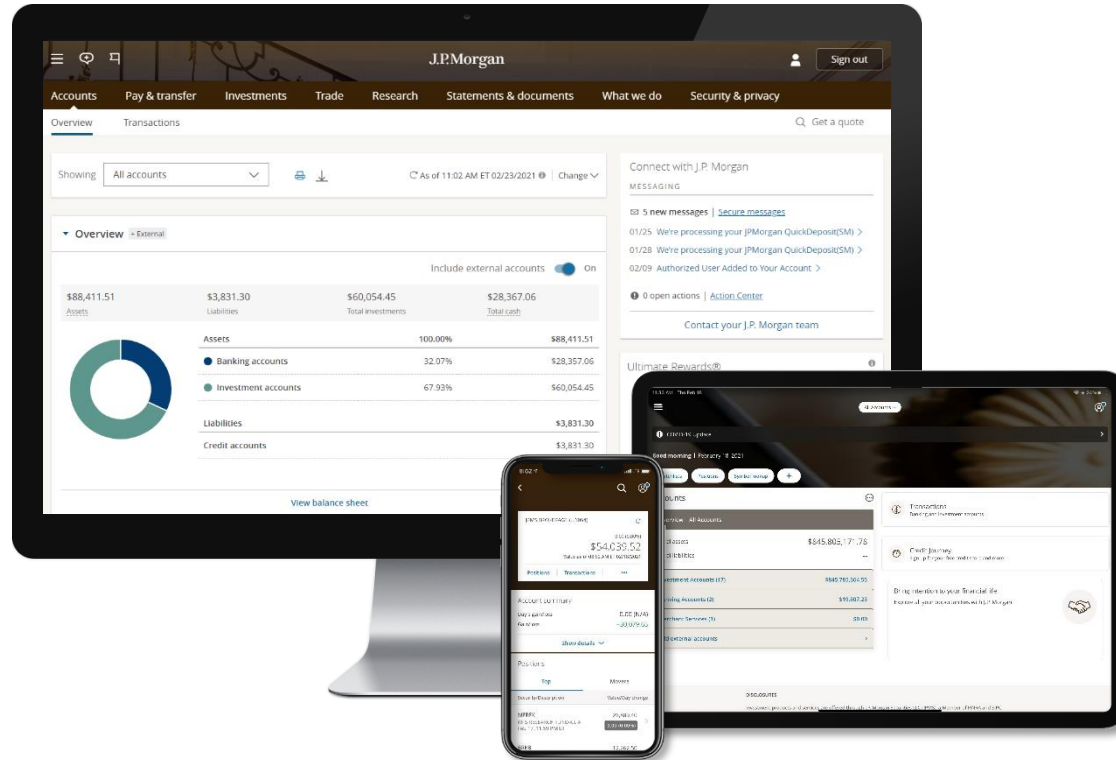


J.P. MORGAN ONLINE<sup>SM</sup> & J.P. MORGAN MOBILE<sup>®1</sup>

# Access & Security Manager<sup>SM</sup> and IP Security



**INVESTMENT PRODUCTS ARE: • NOT FDIC INSURED • NOT A DEPOSIT OR OTHER OBLIGATION OF, OR GUARANTEED BY, JPMORGAN CHASE BANK, N.A. OR ANY OF ITS AFFILIATES • SUBJECT TO INVESTMENT RISKS, INCLUDING POSSIBLE LOSS OF THE PRINCIPAL AMOUNT INVESTED**

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J.P.Morgan

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# Access & Security Manager<sup>SM</sup>

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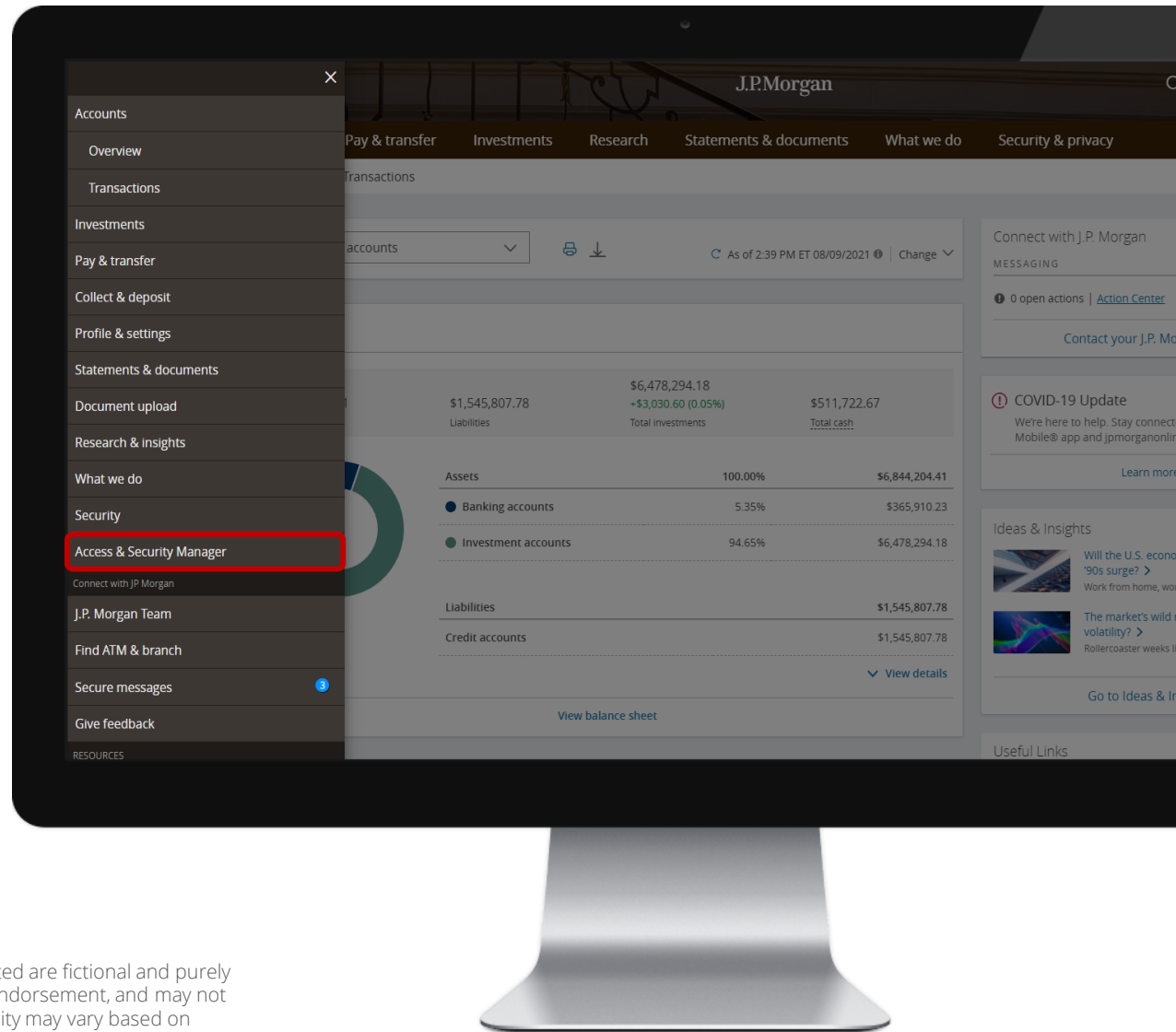
Access & Security Manager enables you to grant trusted individuals customized access to your J.P. Morgan accounts without giving up control and security. With this tool, you can:

- Delegate access to up to 99 users with unique user IDs and passwords and varying levels of access
- Control which accounts users can view, including statements, check images and deposit images
- Authorize users to schedule payments and transfers, and/or approve transactions scheduled by others—all with limits established by you
- Create detailed reports to monitor users' account access and transaction activity

*Note: To delegate money movement authority to authorized users, you must have full money movement authority on the account(s), and you must have the money movement service agreements (for Bill Pay, wire transfers, and/or ACH transfers) active on your own J.P. Morgan Online profile. To activate, navigate to the 'Pay & Transfer' tab and select each money movement type to activate each service. The "Approve transactions" delegation and initiating transactions without requiring approval is only available for authorized users established with the ability to perform and/or approve transactions, and is set up by your J.P. Morgan team.*

# Enrollment: Get Started

To begin the enrollment process, select 'Access & Security Manager' from the ☰ menu located on the top left of the screen.

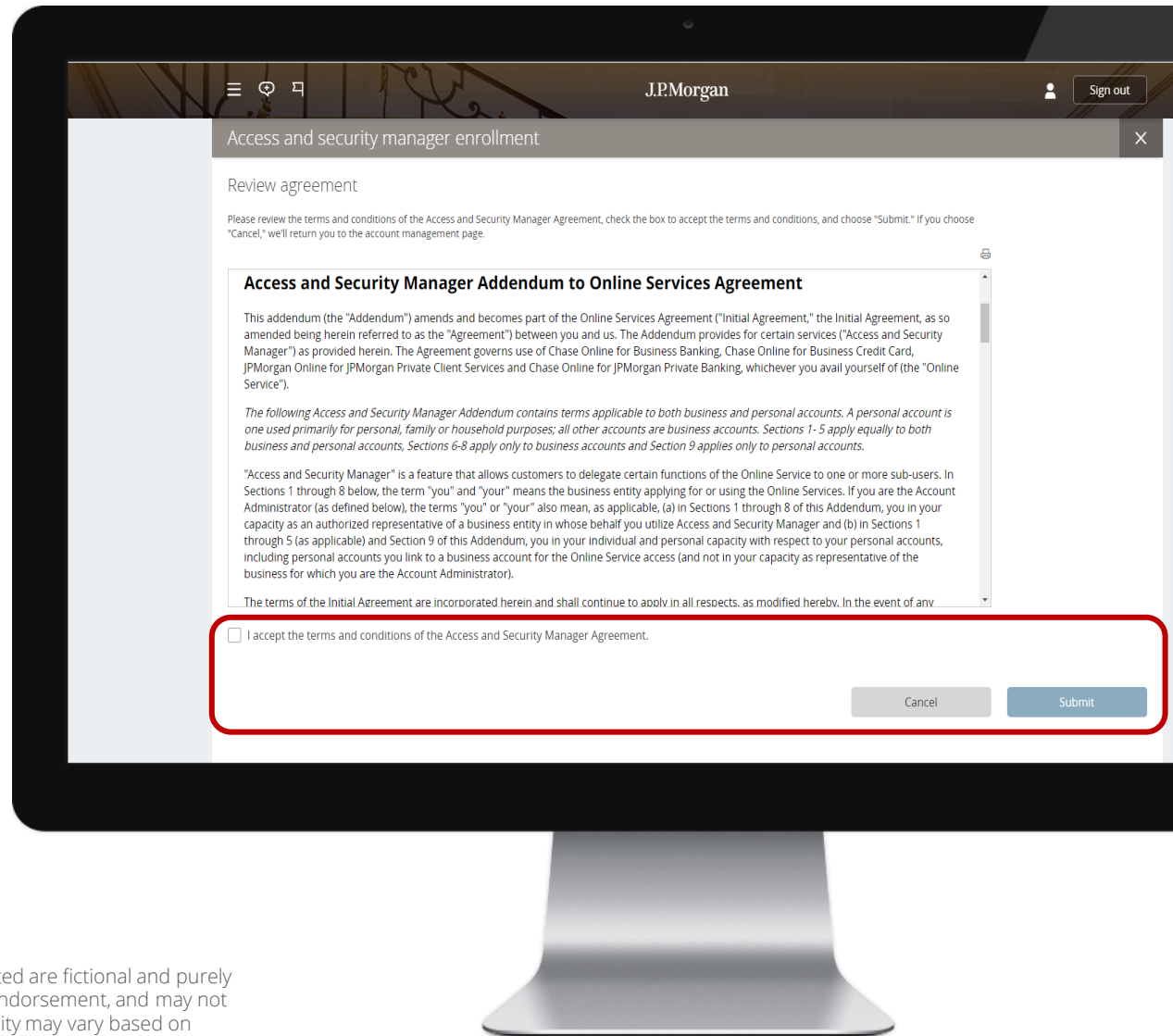


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# Enrollment: Review & Accept Agreement

Review the Access & Security Manager agreement.

To proceed with enrollment, accept the terms and conditions and select **Submit**.

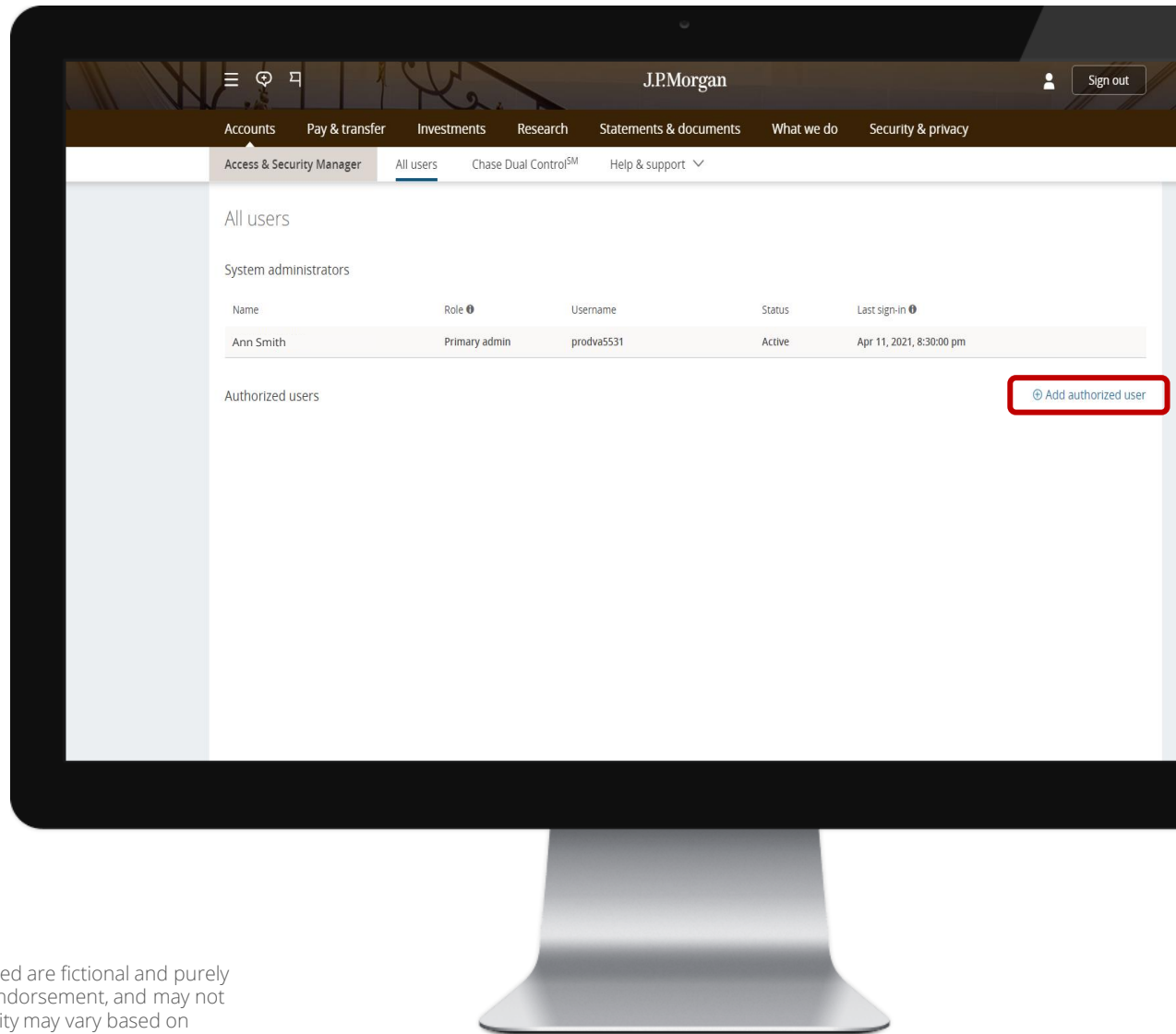


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# Add a New Authorized User

Choose **⊕ Add authorized user** to begin granting a new individual access to your accounts.

*Note: To add an authorized user who can perform transactions without your approval and/or approve transactions submitted by other authorized users, please contact your J.P. Morgan team.*



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# Complete Authorized User Enrollment

Provide the required contact information for your authorized user, and select if the user should have access to the J.P. Morgan Mobile® app. You can add up to four email addresses and phone numbers for each user.

Choose the email address where the authorized user should receive their temporary password. For security purposes, you will need to provide the chosen username to your authorized user.

*Note: Upon logging in for the first time, authorized users are prompted to provide their legal name, primary residence information, and create a unique security identification code.*

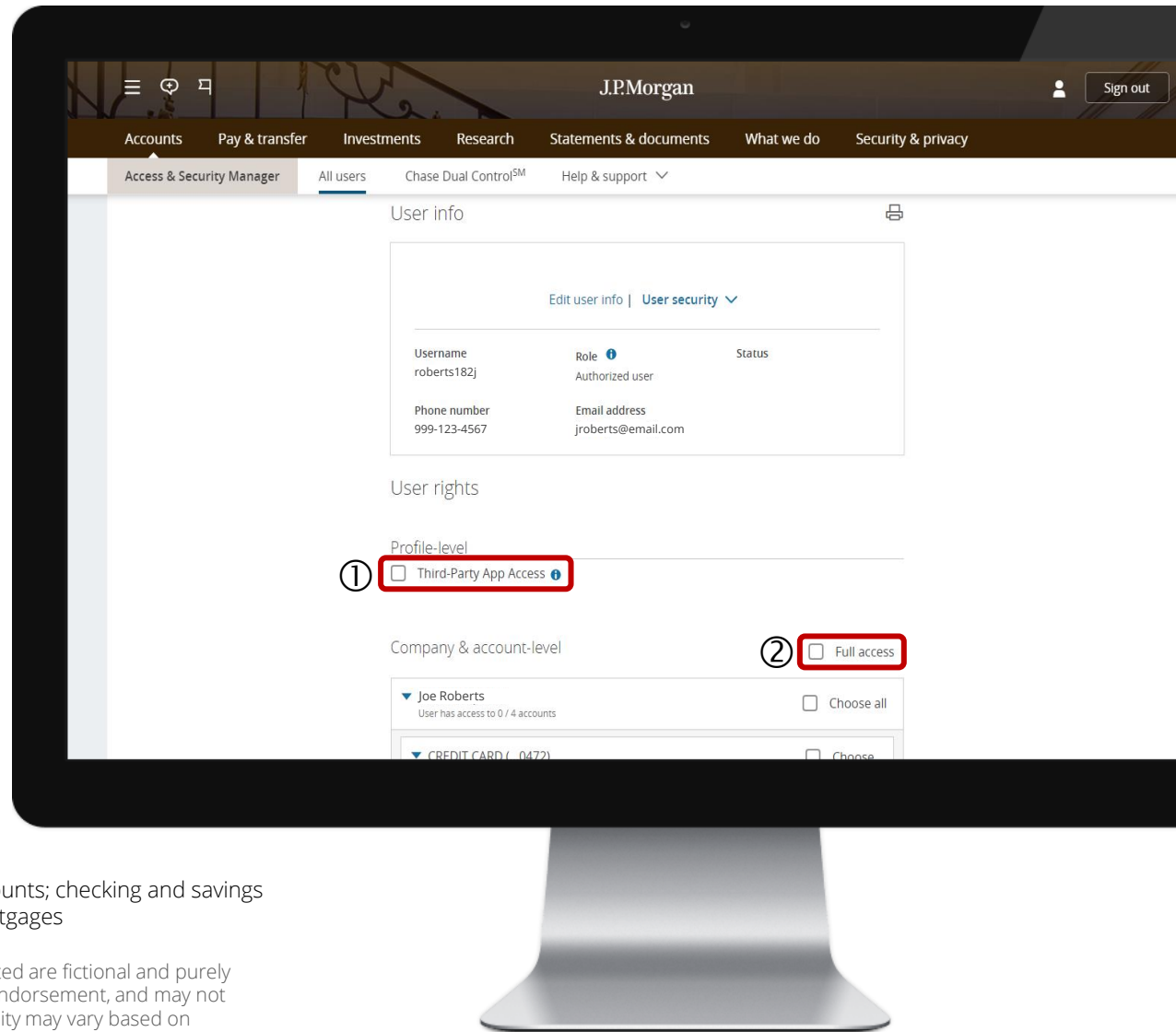
The screenshot shows the J.P. Morgan 'Add new user' interface. At the top, there is a navigation bar with the J.P. Morgan logo and a 'Sign out' button. The main heading is 'Add new user'. Below this, the 'User information' section contains a warning icon and text: 'You may create authorized users online to see your account(s) and set up transactions, but they will not be able to approve transactions (including submitting and releasing funds). To add an authorized user with the ability to approve transactions (including submitting and releasing funds), please contact your J.P. Morgan team. For more information, refer to ["Requirements for Authorized Users"](#).' The form fields are: First name: Joe; Last name: Roberts; Email: jroberts@email.com; Phone: 999-123-4567; Create username: roberts182j; Allow mobile access: Yes (selected); Send temporary password to: Choose an email address. At the bottom, there are 'Cancel', 'Back', and 'Next' buttons.

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# Delegate Access to an Authorized User

Indicate which accounts and services the authorized user should have access to.

- ① Enabling third-party app access allows the user to download permissioned J.P. Morgan account information to authorized financial management applications, such as QuickBooks®.
- ② Selecting 'Full access' enables all services (view and transact) across all eligible accounts\*.



\* Eligible accounts include full-service brokerage accounts; checking and savings accounts; credit cards; and Chase Home Finance mortgages

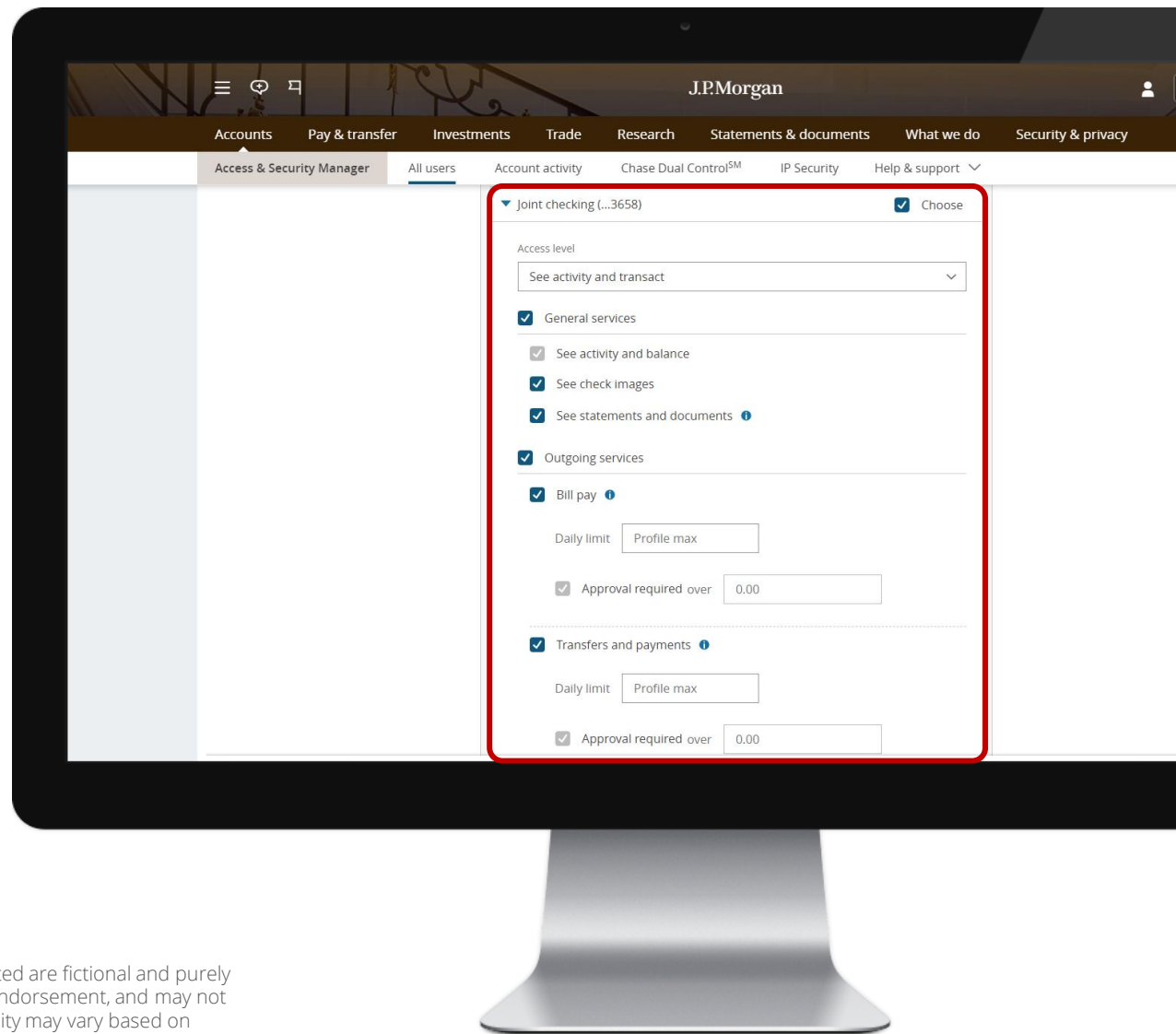
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# Delegate Access to an Authorized User

If you prefer to customize access, you can select each account and choose the access level and services individually.

*Note: "Approve transactions" and "Approval required over \$" are only available for authorized users who are permissioned to perform and/or approve transactions, which must be set up by your J.P. Morgan team.*

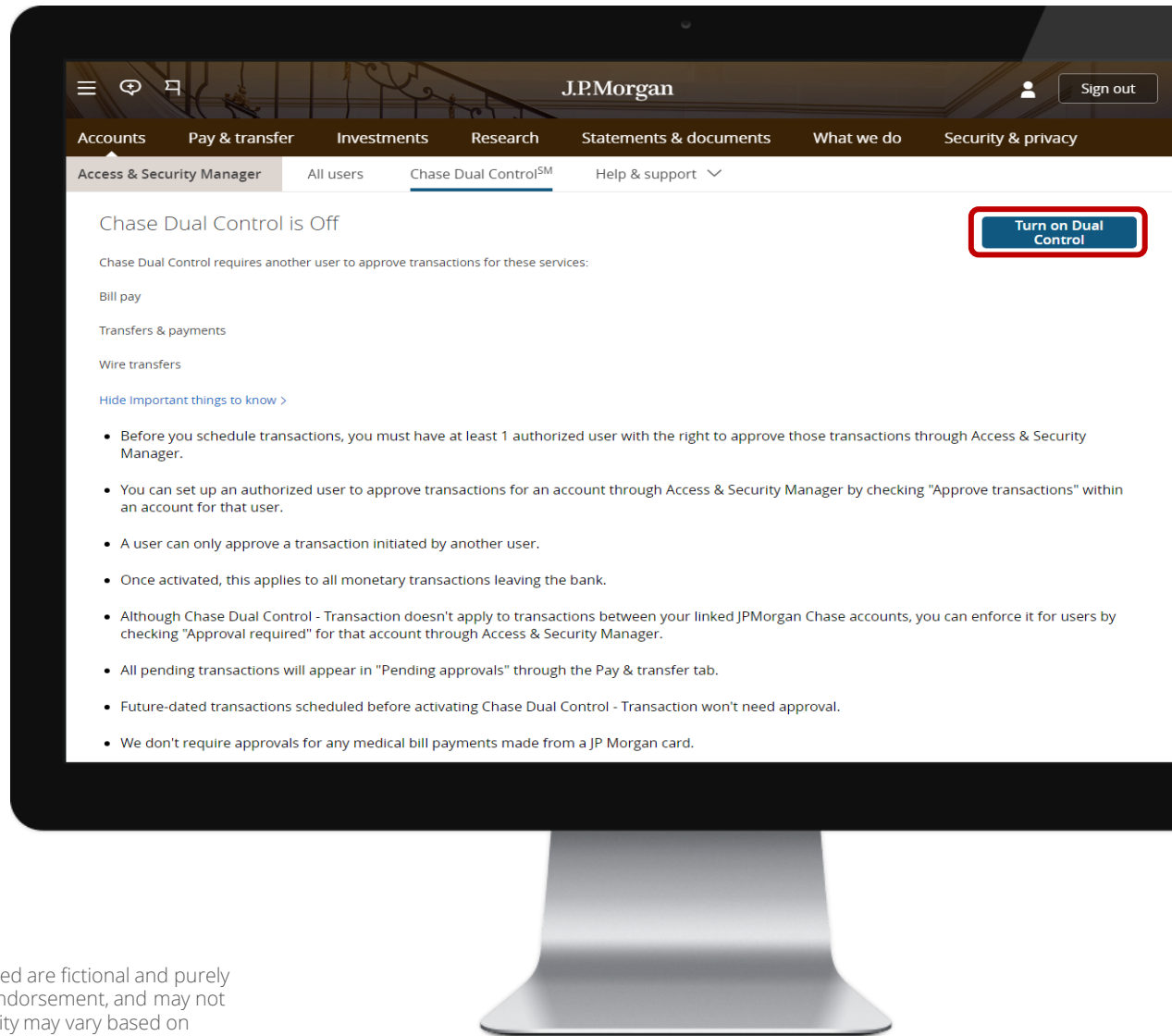


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# Enable Chase Dual Control<sup>SM</sup>

Once you have set up an authorized user\*, you can enable Chase Dual Control, which requires secondary approval for all transactions—helping to ensure a single person cannot process an unauthorized transaction.

To activate, navigate to Chase Dual Control within Access & Security Manager, and select the 'Turn on Dual Control' button. Once enabled, you must contact the Online support team at 866-265-1727 to deactivate the service.



\* "Approve transactions" is only available for authorized users who are permitted to perform and/or approve transactions, and is set up by your J.P. Morgan team.

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# IP Security

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You can enhance the security of your accounts by designating exactly which IP addresses—that is, which computers or mobile devices—may be used to log in to J.P. Morgan Online. An IP address is the numerical label assigned to each computer or device with internet access, and can typically be found within the device's Settings.

Before activating IP Security, you must first set up authorized users via Access & Security Manager. Once access has been granted, you can choose to authorize all devices on a network or limit access to specific computers or devices. Similarly, an individual can have one or multiple authorized account access points—including a home computer, tablet and office computer, for example.

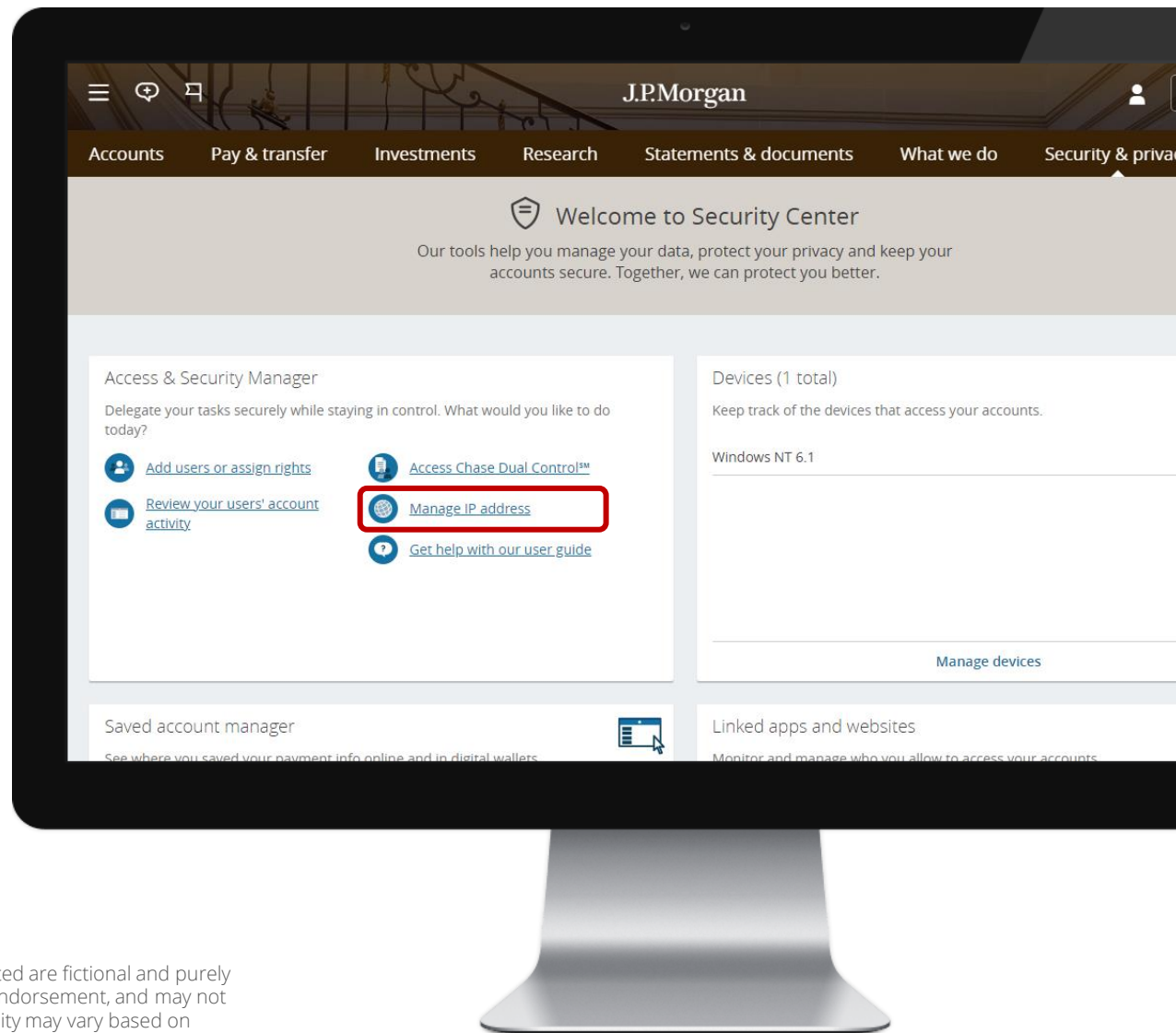
Once IP Security is enabled, users who are permissioned to use the J.P. Morgan Mobile® app will only be able to do so from an authorized IP address. They will not be able to log in via a wireless carrier's network or a Wi-Fi hotspot.

Your J.P. Morgan team is deeply committed to helping you protect your privacy, including the confidentiality of your financial information. Please contact your team at once if you believe your accounts and/or personal financial information have been compromised in some way, including unauthorized users gaining access to your J.P. Morgan Online login information.

# IP Security: Getting Started

IP Security is accessible via the J.P. Morgan Security Center, as well as within Access & Security Manager.

From Security Center select **Manage IP address**, or from Access & Security Manager select **IP Security**,



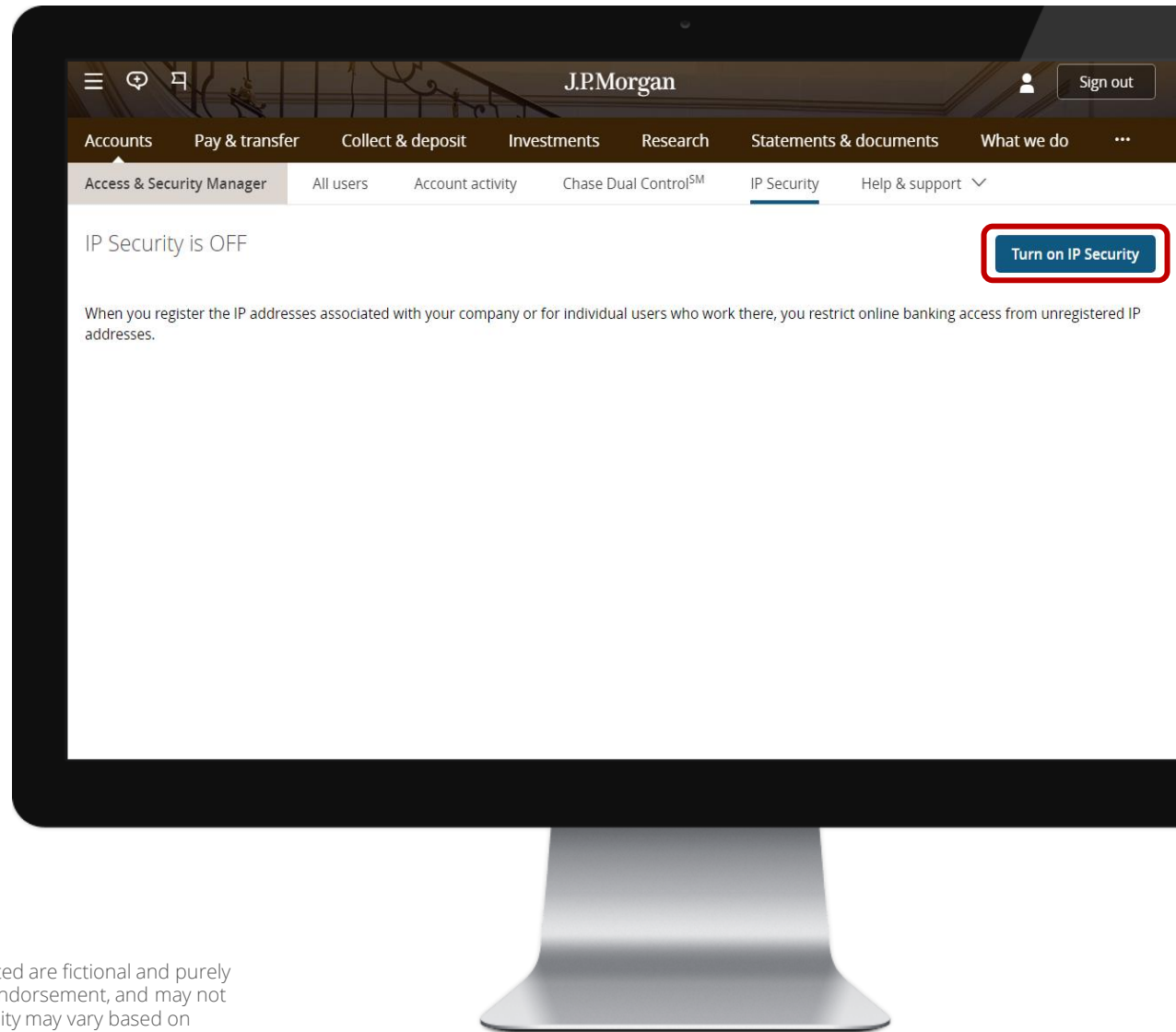
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# Enable IP Security

Select **Turn on IP Security**, and choose if you wish to activate the service at the user or company level.

At the user level, you can customize IP addresses for each authorized user.

At the company level, you will customize IP addresses across all authorized users.

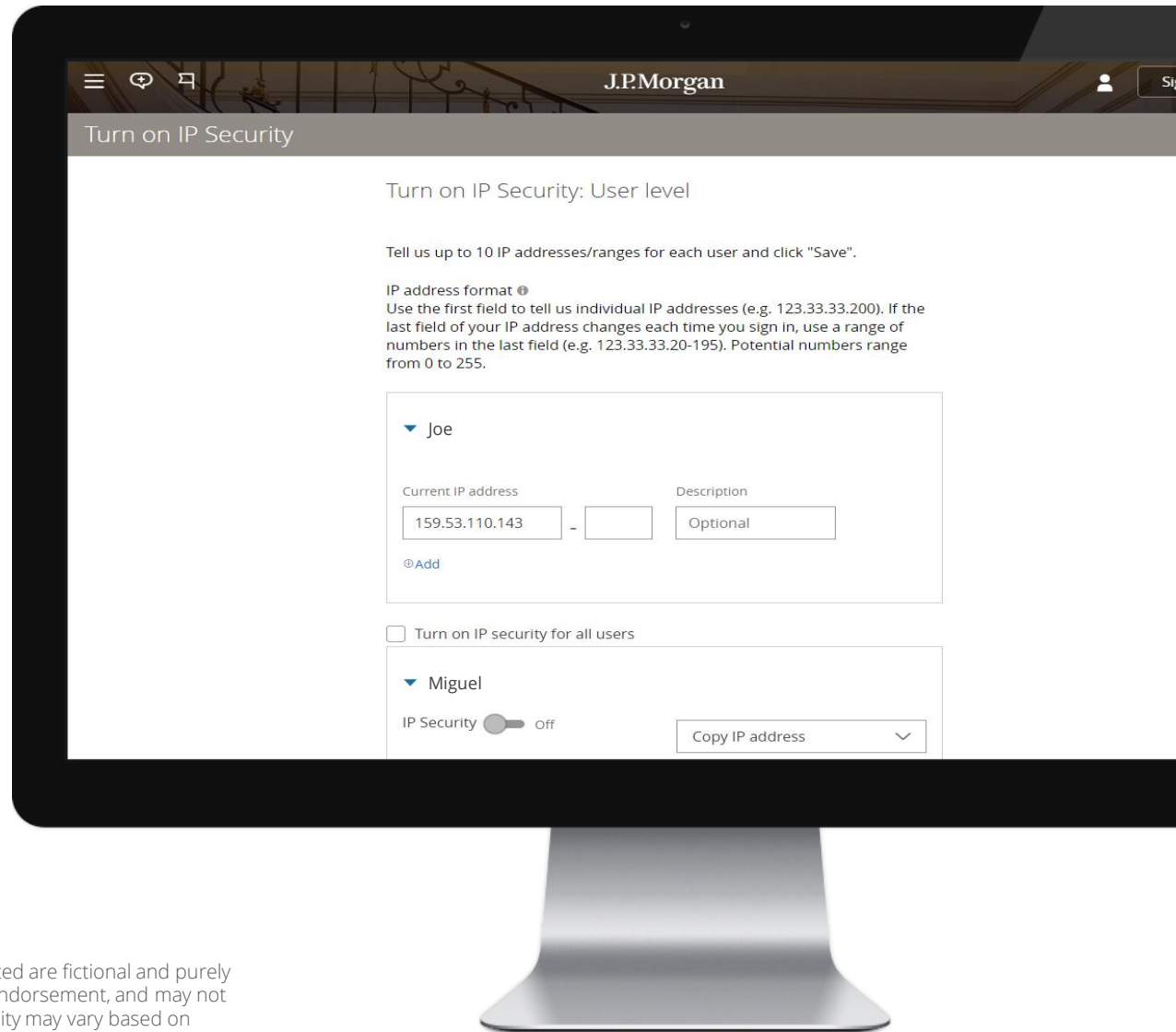


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# Set User-Level Access

For user-level IP security, you can enter up to 10 IP addresses per user. If the last digits of the IP address changes at each login, you can enter a range in the last field.

If a user attempts to log in from an IP address that is not specified, they will not be able to gain access.

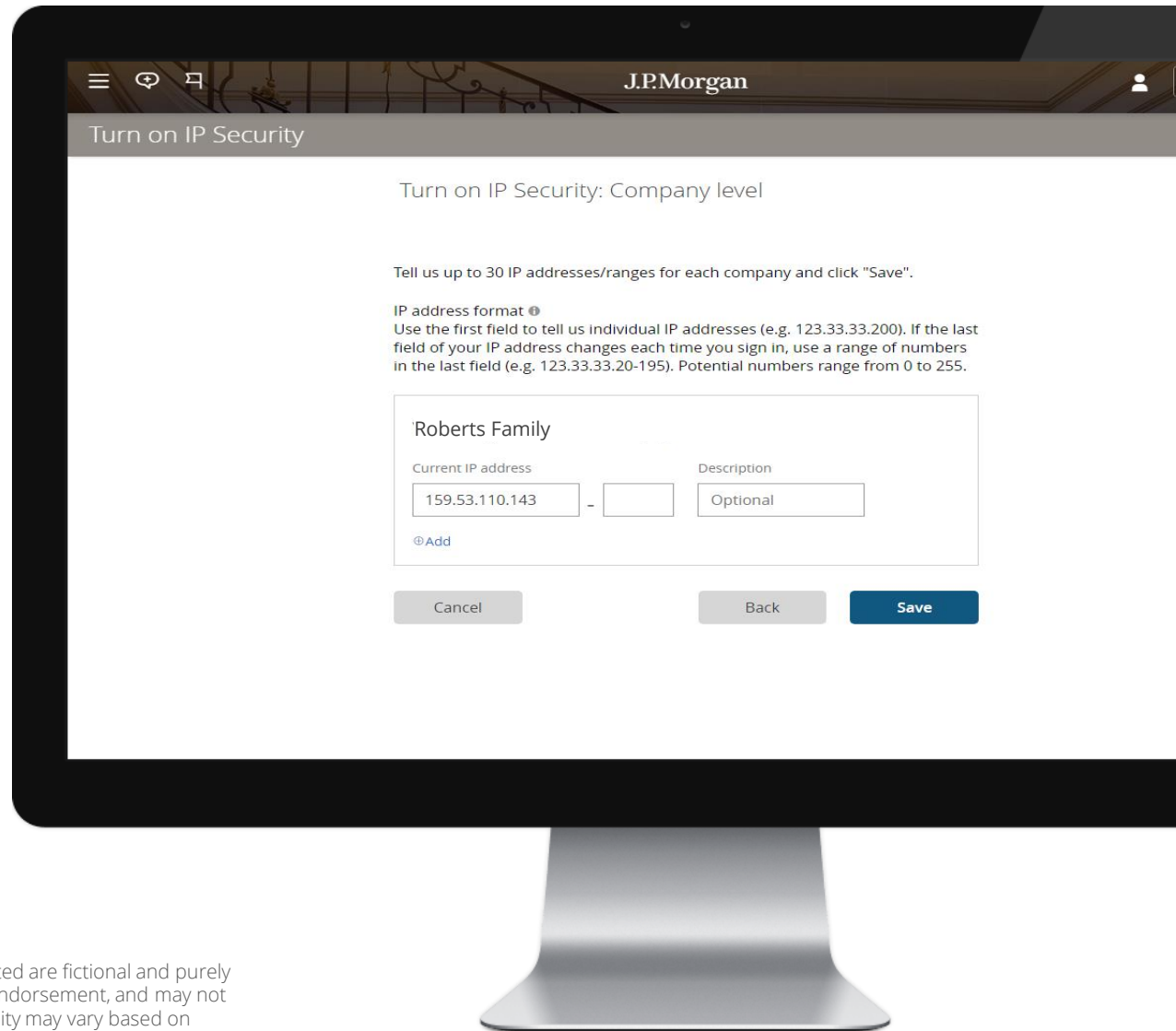


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# Set Company-Level Access

For company-level IP security, you can enter up to 30 IP addresses. If the last digits of the IP address changes at each login, you can enter a range in the last field.

If a user attempts to log in from an IP address that is not specified, they will not be able to gain access.



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## IMPORTANT INFORMATION

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