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Default Password:

Employee's Date of Birth
DDMMYYY

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☐ I have read, understand and accept the terms and conditions described above.

I Do Not Accept Terms | Continue

Change Login ID & Password

Personalize Your Login Information

Now that you have logged in with a default Login ID and password, it is required that you change your Login ID.

Change Login ID

New Login ID:

(ID must be at least 8 but no more than 15 characters in length.)
(ID must contain at least 1 alpha characters and 1 numeric characters.)
(The following characters are not allowed: @)

Change Password (Optional)

Current Password:

New Password:

(Password must be at least 6 but no more than 15 characters
(Password must contain at least 1 alpha characters and 1 numeric characters.)

Confirm New Password:

Cancel Continue

Establish Security Profile

Security Code Delivery

For your security, add a phone number or email address to be used to send you a security code in the future.

Add a Delivery Method

Cancel Continue

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Welcome to TEST PLAN, Enrollment

Choose your account set up path:

Quick Set up

Complete your 401(k) account set up now. You may modify your selections at any time by logging into your account.

Estimated time: 1 minute

Get started

Full Set up

Complete your full set up now by using step-by-step instructions. You can modify your selections at any time by logging into your account.

Estimated time: 10 minutes

Get started

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Switch to Full Enroll

Welcome to TEST PLAN, Enrollment

Quick Set up

Confirm your selections now. You can always modify them later by logging into your account.

Print

Contribution Rate

Choose which percentage of your salary you would like to invest each pay period.

3% Good Start	4% Max Match	5% Top Peer

Select a custom rate --

Increase your contribution by 2% each year starting on 01/01/2023 until reaching a maximum of 15%

Enable Auto-Increase

Investment

CMS

100.00% JPMORGAN SMARTRETIREMENT 2035 R6

I Agree to the Investment

Terms & Conditions

Sample Terms & Conditions text: Mutual Fund investments are subject to market risk. Please read the offer document carefully before investing Mutual Fund investments are subject to market risk. Please read the offer document carefully before investing

Decline Enrollment

Enroll Now

Welcome to TEST PLAN, Enrollment!

About Enrolling in TEST PLAN

Q How long does the enrollment process take?

A About 10 minutes.

Q What information should I have on hand before I begin?

A Before you begin, make sure you have your Social Security Number (SSN) on hand, as well as SSN of anyone else you'd like to name as a beneficiary.

Decline

Start Enrolling

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Confirm your information

Name a beneficiary

Contact preferences

Personal Information

Name: Enrollment Test
Date of Birth: 01/01/1970
Date of Hire: 01/15/2021
Marital Status: Unknown

Contact Information | Edit

123 MAIN ST
CARIBOU, MAINE 04736

Phone:
Mobile:
Personal Email:
Work Email:

Back | Continue

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Confirm your information

Name a beneficiary

Contact preferences

TEST PLAN

Primary Beneficiaries | Add/Update

Beneficiaries do not currently exist.

Contingent Beneficiaries |

Beneficiaries do not currently exist.

Back Continue

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Confirm your information

Name a beneficiary

Contact preferences

Your Plan has automatically enrolled you into receiving paperless communications. Please provide your email address.

Paperless Communications

See your Everyday 401(k) account activity online. Its convenient, safe, and free.

Sign me up to receive the following communications electronically.

- [x] Quarterly Statements
- [x] Transaction Confirmation
- [x] Tax Forms
- [x] Important Notices

Alerts

Email

Verify Email

Work Email

Verify Work Email

Preferred Communication:

○ Personal ○ Work

Communication Disclaimer

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- [x] I agree.

Back | Continue

About me

My salary information

My accounts

My investment style

Results

Let's get started Enrollment!

My current age is **52** and I plan to retire when I am 65

My life expectancy is 95

Skip My Retirement Goals | Back | Continue

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About me

My salary information

My accounts

My investment style

Results

What I have saved so far.

My annual income is $ [ ] and I want [80.00] % of my salary as income at retirement.

My expected salary increase is [4.00] % each year.

My contributions to my retirement plan are [ ] % of my salary.

My employer contributions to my retirement plan are [ ] % of my salary.

Back Continue

About me

My salary information

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My investment style

Results

Known Accounts

Current Accounts Balance **$0.00**

Projected Monthly Retirement Income **$0.00**

Allow us to calculate your Social Security for you (•) Yes ( ) No

Other Accounts

Add/Update

Current Accounts Balance **$0.00**

Projected Monthly Retirement Income **$0.00**

You currently have no other retirement accounts.

Back | Continue

About me

My salary information

My accounts

My investment style

Results

Conservative	Moderate	Aggressive
I would like modest growth, but not at the expense of short term losses.	I want growth, and I'm willing to accept some short term setbacks.	I want my money to grow significantly, I understand that I may experience some short term losses.

Current Investment Style

0.00% 25.00%

Conservative Moderate Aggressive

6.00 %

Investment Style During Your Retirement

0.00% 25.00%

Conservative Moderate Aggressive

7.00 %

Back Continue

About me

My salary information

My accounts

My investment style

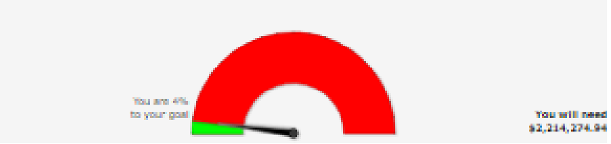
Results

I am on track to have:

Monthly Income: $2,277.96 Total Assets: $108,425.34

Hide Inputs

On your current path you may experience a shortfall at retirement of $2,105,849.60



	Current Accounts Balance	Projected Monthly Retirement Income
Known Accounts	$0.00	$0.00
Other Accounts Add/Update	$0.00	$3,425.00

Your Current Age	Current Income	Retirement Income
52 years old	$ 75,000.00	80.00 %
Retirement Age	**Life Expectancy**	**Salary Increase**
65	95	4.00 %
My Contributions	**Employer Contributions**	**Inflation Rate**
3.00 %	3.00 %	7.00 %

Allow us to calculate your Social Security for you

Yes No

Current Investment Style

0.00% 25.00%

6.00 %

Conservative Moderate Aggressive

Investment Style During Your Retirement

0.00% 25.00%

7.00 %

Conservative Moderate Aggressive

Recalculate

Back | Save Goals Calculation

Choose which percentage of your salary you would like to invest each pay period

- Enter the amount of each paycheck you wish to contribute.
- The total sum of Pre-Tax and Roth contributions must be less than or equal to the plan's maximum percentage (100.00%) values.
- If you select Sign me up for Auto Increase, you must enter either the Pre-tax or Roth contribution (if applicable) for the Default Auto Increase option. If you select the Custom Auto Increase option, you must enter at least one contribution.

Min: 0.00% Max: 100.00%

Pre-Tax What is this?

0.00% 100.00% 3.00 %

Roth What is this?

0.00% 100.00% 1.00 %

Total Percent: 4.00%

☑ Sign me up for Auto Increase. | More Info

Auto Increase Setup

○ **Default** More Info

◉ **Custom** More Info

Frequency Annually

Increase Date 01/01/2023

Increase Pre-Tax contribution by 2.00 %

Until I reach 15.00 %

Increase Roth contribution by 2.00 %

Until I reach 15.00 %

Total Contribution Increase: 4.00%

Back | Continue

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Tell us how you would like to invest.

Select your investments.

Verify and submit your changes.

Choose how you want to allocate your investments. The total needs to add up to 100%.

Your investment elections are set to the plan default investment elections.

You've invested:
100.00%

Print Table

Investments	Asset Class	Current Balance	Current Units	Current Allocations	New Investment Allocations
JPMorgan Core Bond R6 Ticker: JCBUX	Core-Domestic Bonds	$0.00	0.000	0.00 %	0.00%
JPMorgan Emerging Markets Equity R6	Supplemental	$0.00	0.000	0.00 %	0.00%
JPMorgan Equity Income R6	Core-Large Cap Domestic Equity	$0.00	0.000	0.00 %	0.00%
JPMorgan Equity Index R6	Core-Large Cap Domestic Equity	$0.00	0.000	0.00 %	0.00%
JPMorgan Government Bond R6	Core-Domestic Bonds	$0.00	0.000	0.00 %	0.00%
JPMorgan International Equity R6	Core-Large Cap Foreign Equity	$0.00	0.000	0.00 %	0.00%
JPMorgan Investor Balanced R6	Allocation	$0.00	0.000	0.00 %	0.00%
JPMorgan Large Cap Growth R6	Core-Large Cap Domestic Equity	$0.00	0.000	0.00 %	0.00%
JPMorgan Mid Cap Growth R6	Supplemental	$0.00	0.000	0.00 %	0.00%
JPMorgan Mid Cap Value R6	Supplemental	$0.00	0.000	0.00 %	0.00%
JPMorgan Smartretirement 2020 R6	Target Date	$0.00	0.000	0.00 %	0.00%
[illegible]	Target Date	[illegible]	[illegible]	[illegible]	[illegible]

Back | Continue

Tell us how you would like to invest.

Select your investments.

Verify and submit your changes.

Rebalance My Portfolio

Would you like to set up automatic rebalancing for your new portfolio?

○ Yes ◉ No

What is Automatic Future Elections?

Learn more about Automatic Future Elections

Back Continue

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Tell us how you would like to invest.

Select your investments.

Verify and submit your changes.

Does everything look OK? By clicking "Submit", you are confirming your future investment elections.

You are currently participating in a Automated Investment model. This model is designed to apply designated allocations to rebalancing your account Annually. The next rebalance date is 08/27/2022. By changing your investments, you will be moved out of your current model.

You are authorizing continued use of the plan default investment elections.

Action:	Future Investment Elections	
Affecting:	Future Contributions	
New Investments:	JPMorgan Smartretirement 2035 R6	100.00%
	Total:	100.00%

Back | Continue

Does everything look OK? Please review your choices and then click "Submit".

Personal Information

Name:	Enrollment Test
Date Of Birth:	01/01/1970
Date Of Hire:	01/15/2021
Marital Status:	Unknown

Contact Information | Edit

Mailing Address:	123 MAIN ST CARIBOU, MAINE 04736
Phone:	
Mobile:	
Personal Email:	TEST@TEST.COM
Work Email:	

Beneficiaries | Edit

There is no beneficiary information.

Contributions | Edit

Pre-Tax:	3.00%
Roth:	1.00%
Auto Contribution Increase:	Custom
Frequency:	Annually
Increase Date:	01/01/2023
Pre-Tax Increase:	2.00% (max up to 15.00%)
Roth Increase:	2.00% (max up to 15.00%)

Investments | Edit

Apply To:	All Employer Contribution and Employee Contribution	
Investments:	JPMorgan Smartretirement 2035 R6	100.00%
	Total:	100%
Auto Rebalance:		NO

Communications & Alerts | Edit

Electronic Communications

Quarterly Statements:	On
Transaction Confirmation:	On
Tax Forms:	On
Important Notices:	On

Back | Submit

Everyday 401(k) by J.P.Morgan

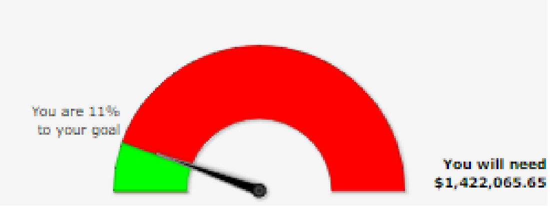
Plan Name: **TEST PLAN** **$26,504.42** as of 03/14/2022 Print

Total Balance:	Vested Balance:	Last Contribution:	YTD Return: 10/31/2020
$26,504.42	$17,983.13	$300.00	--

My Retirement Goals | My Asset Allocation

Income View | Asset View

On your current path you may experience a shortfall at retirement of $1,257,108.28



Actions to Take

- Increase your contributions
- Change your investment mix

Update My Goals

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I want to...

- Get a statement
- Change my profile
- Change my communications
- Change contributions
- Change investments
- Check my performance
- Request a loan
- Withdraw money
- Research investment options

NEED ASSISTANCE?

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Everyday 401(k) by J.P.Morgan

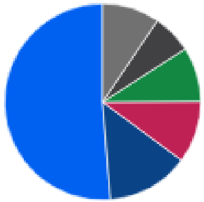
Plan Name: TEST PLAN $26,504.42 as of 03/14/2022

Total Balance:	Vested Balance:	Last Contribution:	YTD Return: 10/31/2020
$26,504.42	$17,983.13	$300.00	--

My Retirement Goals | My Asset Allocation

View: Asset Class

My Current Allocation



Asset Class	
Target Date	51.28%
Core-Large Cap Domestic Equity	13.62%
Core-Cash Equivalents	10.19%
Supplemental	8.96%
Core-Domestic Bonds	6.49%
Other	9.46%

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Welcome back, Test | My Profile | Log Out

Everyday 401(k) by J.P.Morgan

Plan Name: TEST PLAN $26,504.42 as of 03/14/2022 Print

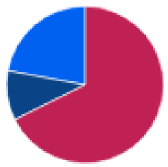
Summary | My Portfolio | Contributions | Loans & Withdrawals | Statements & Transactions | Plan Information | Research Investments | Forms & Notices

My Portfolio

Change Investments

Holdings | Elections | Performance

View: Investments View as of: 03/14/2022



Investments

JPMorgan Smartretirement 2020 R6	22.14%
JPMorgan US Government Mmkt Instl	10.19%
Other	67.67%

Total Balance: $26,504.42

Vested Balance: $17,983.13

Show Contribution Types Print Table

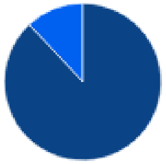
Investments	Asset Class	Units	Price	Price Date	Balance	QTD Change	YTD Change
JPMorgan Smartretirement 2020 R6	Target Date	370.034	$15.870	03/14/2022	$5,872.44	$375.34	$375.34
JPMorgan US Government Mmkt Instl	Core-Cash Equivalents	2,701.720	$1.000	03/14/2022	$2,701.72	$360.00	$360.00
JPMorgan Equity Income R6	Core-Large Cap Domestic Equity	42.158	$22.800	03/14/2022	$961.21	$79.37	$79.37
JPMorgan Mid Cap Value R6	Supplemental	24.191	$39.640	03/14/2022	$958.93	$74.48	$74.48
JPMorgan US Equity R6	Core-Large Cap Domestic Equity	46.793	$19.580	03/14/2022	$916.20	$5.30	$5.30
JPMorgan Equity Index R6	Core-Large Cap Domestic Equity	14.476	$62.800	03/14/2022	$909.08	$1.42	$1.42
JPMorgan US Small Company R6	Core-Small Cap Domestic Equity	50.400	$17.330	03/14/2022	$873.44	$23.95	$23.95
JPMorgan Government Bond R6	Core-Domestic Bonds	82.894	$10.390	03/14/2022	$861.27	$85.45	$85.45

Everyday 401(k) by J.P.Morgan

Plan Name: **TEST PLAN** **$26,504.42** as of **03/14/2022** Print

My Portfolio

Change Investments



My Elections

JPMorgan US Government Mmkt Instl	12.00%
Other	88.00%

Investments	Asset Class	Current Election	Last Contribution	QTD Contribution	YTD Contribution
JPMorgan US Government Mmkt Instl	Core-Cash Equivalents	12.00%	$36.00	$360.00	$360.00
JPMorgan Core Bond R6	Core-Domestic Bonds	4.00%	$12.00	$120.00	$120.00
JPMorgan Emerging Markets Equity R6	Supplemental	4.00%	$12.00	$120.00	$120.00
JPMorgan Equity Income R6	Core-Large Cap Domestic Equity	4.00%	$12.00	$120.00	$120.00
JPMorgan Equity Index R6	Core-Large Cap Domestic Equity	4.00%	$12.00	$120.00	$120.00
JPMorgan Government Bond R6	Core-Domestic Bonds	4.00%	$12.00	$120.00	$120.00
JPMorgan International Equity R6	Core-Large Cap Foreign Equity	4.00%	$12.00	$120.00	$120.00
JPMorgan Investor Balanced R6	Allocation	4.00%	$12.00	$120.00	$120.00
JPMorgan Large Cap Growth R6	Core-Large Cap Domestic Equity	4.00%	$12.00	$120.00	$120.00
JPMorgan Mid Cap Growth R6	Supplemental	4.00%	$12.00	$120.00	$120.00
JPMorgan Mid Cap Value R6	Supplemental	4.00%	$12.00	$120.00	$120.00
JPMorgan Smartretirement 2020 R6	Target Date	4.00%	$12.00	$120.00	$120.00
JPMorgan Smartretirement 2025 R6	Target Date	4.00%	$12.00	$120.00	$120.00
JPMorgan Smartretirement 2030 R6	Target Date	4.00%	$12.00	$120.00	$120.00
JPMorgan Smartretirement 2035 R6	Target Date	4.00%	$12.00	$120.00	$120.00

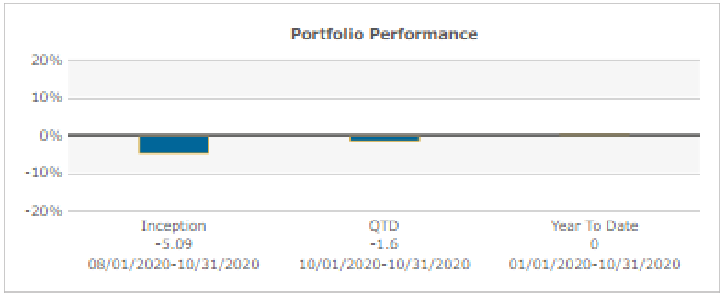
Plan Name: TEST PLAN $26,504.42 as of 03/14/2022

Print

My Portfolio

Change Investments

Holdings | Elections | Performance

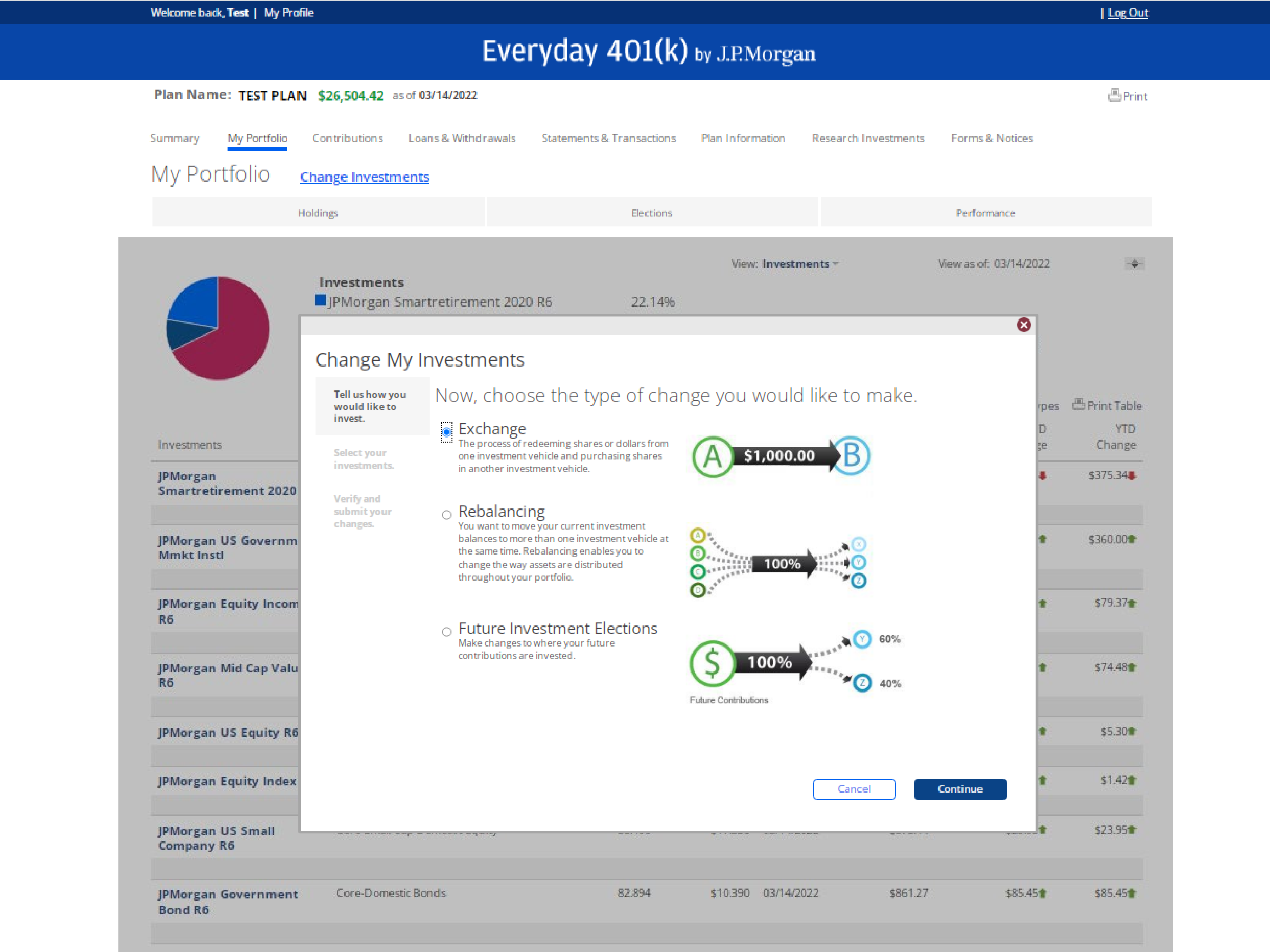


Year To Date Performance:
0.00%
(01/01/2020 - 10/31/2020)

Inception To Date Performance:
-5.09%

Print Table

Investments	Inception	QTD	Year To Date
JPMorgan Smartretirement 2020 R6	-5.09%	-1.60%	0.00%
JPMorgan Smartretirement 2025 R6	--	--	--
JPMorgan Core Bond R6	--	--	--
JPMorgan Emerging Markets Equity R6	--	--	--
JPMorgan Equity Income R6	--	--	--
JPMorgan Equity Index R6	--	--	--
JPMorgan Government Bond R6	--	--	--
JPMorgan International Equity R6	--	--	--
JPMorgan Investor Balanced R6	--	--	--


Welcome back, Test | My Profile
| Log Out
Everyday 401(k) by J.P.Morgan
Plan Name: TEST PLAN $26,504.42 as of 03/14/2022
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Summary
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Holdings
Elections
Performance
View: Investments
View as of: 03/14/2022
Investments
JPMorgan Smartretirement 2020 R6 22.14%
Print Table
Investments
YTD Change
JPMorgan Smartretirement 2020
$375.34
JPMorgan US Governm Mmkt Instl
$360.00
JPMorgan Equity Incom R6
$79.37
JPMorgan Mid Cap Valu R6
$74.48
JPMorgan US Equity R6
$5.30
JPMorgan Equity Index
$1.42
JPMorgan US Small Company R6
$23.95
JPMorgan Government Bond R6
Core-Domestic Bonds
82.894
$10.390
03/14/2022
$861.27
$85.45
$85.45
Change My Investments
Tell us how you would like to invest.
Select your investments.
Verify and submit your changes.
Now, choose the type of change you would like to make.
Exchange
The process of redeeming shares or dollars from one investment vehicle and purchasing shares in another investment vehicle.
A
$1,000.00
B
Rebalancing
You want to move your current investment balances to more than one investment vehicle at the same time. Rebalancing enables you to change the way assets are distributed throughout your portfolio.
100%
Future Investment Elections
Make changes to where your future contributions are invested.
100%
60%
40%
Future Contributions
Cancel
Continue

Welcome back, Test | My Profile | Log Out

Everyday 401(k) by J.P.Morgan

Plan Name: TEST PLAN $26,504.42 as of 03/14/2022 Print

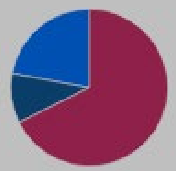
Summary | My Portfolio | Contributions | Loans & Withdrawals | Statements & Transactions | Plan Information | Research Investments | Forms & Notices

My Portfolio

Change Investments

Holdings | Elections | Performance

View: Investments View as of: 03/14/2022



Investments

JPMorgan Smartretirement 2020 R6	22.14%
JPMorgan US Government Mmkt Instl	10.19%
Other	67.67%

Total Balance: $26,504.42

Vested Balance: $17,983.13

es Print Table

Investments							YTD Change
JPMorgan Smartretirement 202(							$375.34
JPMorgan US Governn Mmkt Instl							$360.00
JPMorgan Equity Incor R6							$79.37
JPMorgan Mid Cap Val(R6							$74.48
JPMorgan US Equity R6	Core-Large Cap Domestic Equity	46.793	$19.580	03/14/2022	$916.20	$5.30	$5.30
JPMorgan Equity Index R6	Core-Large Cap Domestic Equity	14.476	$62.800	03/14/2022	$909.08	$1.42	$1.42
JPMorgan US Small Company R6	Core-Small Cap Domestic Equity	50.400	$17.330	03/14/2022	$873.44	$23.95	$23.95
JPMorgan Government Bond R6	Core-Domestic Bonds	82.894	$10.390	03/14/2022	$861.27	$85.45	$85.45

Change My Investments

Tell us how you would like to invest.

Select your investments.

Verify and submit your changes.

Choose the investment you want to exchange.

JPMORGAN SMARTRETIREMENT 2020 R6 $12.00 0.753 Units

Amount to exchange

- All Available
- Some:

$ ____ or ____ % or ____ Units

Cancel | Back | Continue

Welcome back, Test | My Profile | Log Out

Everyday 401(k) by J.P.Morgan

Plan Name: TEST PLAN $26,504.42 as of 03/14/2022 Print

Summary My Portfolio ... Notices

My Portfolio

Change My Investments

Tell us how you would like to invest.

Select your investments.

Verify and submit your changes.

Choose how you want to allocate your investments. The total needs to add up to 100%.

You need to invest: 100 %

You've invested: 100.00 %

Print Table

Investments	Current Balance	Current Units	New Investment Allocations %
JPMORGAN US GOVERNMENT MMKT INSTL	$2,737.72	2,737.720	0.00%
JPMORGAN SMARTRETIREMENT 2060 R6	$880.36	43.496	0.00%
JPMORGAN CORE BOND R6 Ticker: JCBUX	$870.10	77.757	25%
JPMORGAN EMERGING MARKETS EQUITY R6	$6,559.21	224.246	0.00%
JPMORGAN SMARTRETIREMENT 2055 R6	$880.21	35.636	0.00%
JPMORGAN INVESTOR BALANCED R6	$856.29	54.437	0.00%
JPMORGAN LARGE CAP GROWTH R6	$855.51	15.691	25%
JPMORGAN MID CAP GROWTH R6	$796.75	18.153	0.00%
JPMORGAN MID CAP VALUE R6	$983.75	24.490	0.00%
JPMORGAN INTERNATIONAL EQUITY R6	$813.91	46.616	25%
JPMORGAN SMARTRETIREMENT 2025 R6	$874.85	51.613	0.00%
JPMORGAN SMARTRETIREMENT 2045 R6	$880.83	42.967	0.00%
JPMORGAN SMARTRETIREMENT INCOME R6	$876.00	57.069	0.00%
JPMORGAN SMARTRETIREMENT 2030 R6	$874.61	47.429	0.00%
JPMORGAN SMARTRETIREMENT 2050 R6	$880.46	42.575	0.00%
JPMORGAN US EQUITY R6	$949.26	47.392	0.00%
JPMORGAN US SMALL COMPANY R6	$896.53	51.084	0.00%
JPMORGAN EQUITY INDEX R6	$940.64	14.663	25%
JPMORGAN GOVERNMENT BOND R6	$872.45	84.051	0.00%
JPMORGAN EQUITY INCOME R6	$986.28	42.678	0.00%

Cancel Back Continue

Welcome back, Test | My Profile | Log Out

Everyday 401(k) by J.P.Morgan

Plan Name: TEST PLAN $26,504.42 as of 03/14/2022 Print

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My Portfolio

Change Investments

Holdings | Elections | Performance

View: Investments View as of: 03/14/2022

Investments

JPMorgan Smartretirement 2020 R6	22.14%
JPMorgan US Government Mmkt Instl	10.19%

Total Balance: Vested Balance:

Change My Investments

Tell us how you would like to invest.

Select your investments.

Verify and submit your changes.

Does everything look OK? By clicking "Submit", you are confirming your future investment elections.

Exchanging From:	JPMORGAN SMARTRETIREMENT 2020 R6	
To:	JPMORGAN CORE BOND R6 Ticker: JCBUX	25.00%
	JPMORGAN LARGE CAP GROWTH R6	25.00%
	JPMORGAN INTERNATIONAL EQUITY R6	25.00%
	JPMORGAN EQUITY INDEX R6	25.00%
	Total:	100%
Amount:	All Available	
Process Date:	03/16/2022	

Cancel | Back | Continue

Print Table

Investments							YTD Change
JPMorgan Smartretireme[…]							$375.34
JPMorgan US G[…] Mmkt Instl							$360.00
JPMorgan Equit[…] R6							$79.37
JPMorgan Mid C[…] R6							$74.48
JPMorgan US Ec[…]							$5.30
JPMorgan Equity Index R6	Core-Large Cap Domestic Equity	14.476	$62.800	03/14/2022	$909.08	$1.42	$1.42
JPMorgan US Small Company R6	Core-Small Cap Domestic Equity	50.400	$17.330	03/14/2022	$873.44	$23.95	$23.95
JPMorgan Government Bond R6	Core-Domestic Bonds	82.894	$10.390	03/14/2022	$861.27	$85.45	$85.45

Everyday 401(k) by J.P.Morgan

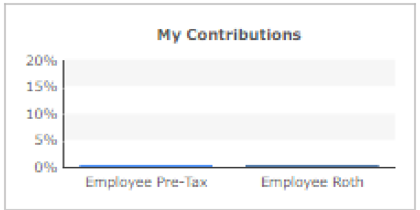
Plan Name: **TEST PLAN** **$26,504.42** as of **03/14/2022**

Contributions

Change Contributions

On your current path you may experience a shortfall at retirement.

Below is a breakdown of your account contributions.



My Total Contributions (% of Pay): 0.00%

Employee Pre-Tax: 0.00%

Employee Roth: 0.00%

Print Table

Contribution Type	Last Contribution Date	Last Contribution Amount	QTD Contribution	YTD Contribution	Prior Year Contribution
Employee					
Employee Elective Deferral	03/09/2022	$100.00	$1,000.00	$1,000.00	$5,800.00
Roth Employee Elective Deferral	03/09/2022	$100.00	$1,000.00	$1,000.00	$5,400.00
Deemed Loan Repayments		$0.00	$0.00	$0.00	$0.00
Total Employee:			**$2,000.00**	**$2,000.00**	**$11,200.00**
Employer					
Employer Matching	03/09/2022	$100.00	$1,000.00	$1,000.00	$5,450.00
Safe Harbor Match	12/11/2020	$25.00	$0.00	$0.00	$0.00
Total Employer:			**$1,000.00**	**$1,000.00**	**$5,450.00**
Total			**$3,000.00**	**$3,000.00**	**$16,650.00**

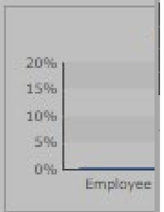
Plan Name: TEST PLAN $26,504.42 as of 03/14/2022 Print

Contributions

Change Contributions

On your current path you may experience a shortfall at retirement.

Below is a break



Change My Contributions

Change Contribution Amounts.

Verify and submit changes.

On your current path you may experience a shortfall at retirement.

Enter the amount of each paycheck you wish to contribute.

The total sum of Pre-Tax and Roth contributions must be less than or equal to the plan's maximum percentage **(100.00%)** values.

If you select Sign me up for Auto Increase, you must enter either the Pre-tax or Roth contribution (if applicable) for the Default Auto Increase option. If you select the Custom Auto Increase option, you must enter at least one contribution.

Min: 0.00% Max: 100.00%

Pre-Tax What is this?

0.00% 100.00% 3 %

Roth What is this?

0.00% 100.00% 3 %

Total Percent: 6.00%

☐ Sign me up for Auto Increase. | More Info

Cancel Continue

Print Table

Contribution Type	Prior Year [...]bution
Employee	
Employee Elective D[...]	[...],800.00
Roth Employee Elec[...]	[...],400.00
Deemed Loan Repa[...]	$0.00
Total Employee:	**[...]200.00**
Employer	
Employer Matching	[...],450.00
Safe Harbor Match	$0.00
Total Employer:	**[...]450.00**
Total	**[...],650.00**

Welcome back, Test | My Profile | Log Out

Everyday 401(k) by J.P.Morgan

Plan Name: **TEST PLAN** $26,504.42 as of 03/14/2022 Print

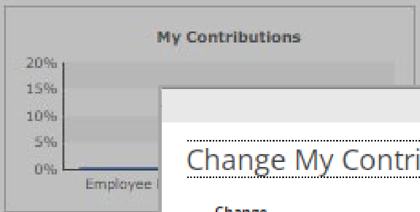
Summary | My Portfolio | Contributions | Loans & Withdrawals | Statements & Transactions | Plan Information | Research Investments | Forms & Notices

Contributions

Change Contributions

On your current path you may experience a shortfall at retirement.

Below is a breakdown of your account contributions.



My Total Contributions (% of Pay): 0.00%

Change My Contributions

Change Contribution Amounts.

Verify and submit changes.

Your New Contribution Results.

Pre-Tax:	**3.00%**
Roth:	**3.00%**
Auto Increase:	No

You have chosen to opt-out of systematically increasing your contribution deferrals.

Cancel | Back | Submit Changes

Print Table

Contribution Type					Prior Year Contribution
Employee					
Employee Elective D					,800.00
Roth Employee Elec					,400.00
Deemed Loan Repa					$0.00
Total Employee:					**,200.00**
Employer					
Employer Matching	03/09/2022	$100.00	$1,000.00	$1,000.00	$5,450.00
Safe Harbor Match	12/11/2020	$25.00	$0.00	$0.00	$0.00
Total Employer:			**$1,000.00**	**$1,000.00**	**$5,450.00**
Total			**$3,000.00**	**$3,000.00**	**$16,650.00**

Plan. Save. Invest.

Explore J.P. Morgan Asset Management's retirement calculators and insights, as well as discover helpful tips from Chase to manage saving and spending in retirement

Everyday 401(k) by J.P.Morgan

Plan Name: **TEST PLAN** **$26,504.42** as of **03/14/2022** Print

Loan Information Actions

Loan Balance: $2,000.00 Loan Available: $7,870.12

Loan ID	Outstanding Balance	Payment Frequency	Expected Payment	Payoff Date	Status	Next Payment Date	Repayment Method
1	$2,000.00	Bi-weekly	$34.62	02/01/2025	Deemed	03/27/2022	Payroll

Withdrawal Information Model a Withdrawal Request a Withdrawal View Available Amounts

Type:	ID	Date	Amount	Status
There is no withdrawal history.				

NEED ASSISTANCE?

If you have questions, please call 855-200-1230. The TTY is 711 followed by 855-200-1230. Representatives are available to assist you weekdays from 8:00 a.m. to 6:00 p.m. EST.

Legal

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Loan Information Actions

Loan Balance: $2,000.00 Loan Available: $7,870.12

Loan ID	Outstanding Balance	Payment Frequency	Expected Payment	Payoff Date	Status	Next Payment Date	Repayment Method
1	$2,000.00	Bi-weekly	$34.62	02/01/2025	Deemed	03/27/2022	Payroll

Withdrawal Information Model a Withdrawal Request a Withdrawal View Available Amounts

Type: ... s

There is no withdrawal history.

Explore J.P. Morgan Asset Man... and spending in retirement.

Request a Loan

Loan Balance: $2,000.00 Loan Available: $7,870.12

Request a loan.

Verify and submit.

Loan Request

Payment Frequency: Weekly

Interest Rate: 5.25%

Loan Amount:* $ 1000 (From $1,000.00 to $7,870.12)

Number of Payments:* 12 (From 1 to 260)

Distribution Method: Check

☐ Rapid Delivery Carrier: UPS Next Day Air (Street Default

Repayment Method

◉ Payroll

○ Bank Account

Cancel Continue

Everyday 401(k) by J.P.Morgan

Plan Name: TEST PLAN $26,504.42 as of 03/14/2022 Print

Loan Information Actions

Loan Balance: $2,000.00 Loan Available: $7,870.12

Loan ID	Outstanding Balance	Payment Frequency	Expected Payment	Payoff Date	Status	Next Payment Date	Repayment Method
1	$2,000.00	Bi-weekly	$34.62	02/01/2025	Deemed	03/27/2022	Payroll

Withdrawal Information Model a Withdrawal Request a Withdrawal View Available Amounts

Type:

There is no withdrawal history.

Explore J.P. Morgan Asset Mana ... and spending in retirement.

Print

Request a Loan

Loan Balance: $2,000.00 Loan Available: $7,870.12

Request a loan.

Verify and submit.

Loan Request Verification

Requested Loan Amount: **$1,000.00**

Interest Rate:	5.25%
Payment Frequency:	Weekly
Number of Payments:	12
Payment Amount:	$83.88
First Payment Date:	04/15/2022
Additional Fee(s):	$0.00
Repayment Method:	Payroll

Your loan check will be sent to the following address:

Test Enrollment
306 CARL LN
JEFFERSON CITY MISSOURI 65101-3908

Cancel Back Submit

NEED ASSISTANCE?

If you have questions, please call 855-200-1230. The TTY is 711 followed by 855-200-1230. Representatives are available to assist you weekdays from 8:00 a.m. to 6:00 p.m. EST.

A prospectus for each fund available for investment under your plan is available by clicking on the Research Investments tab above or, if you are unable to access the funds' prospectus from the website, please contact your employer. Investors should carefully consider the investment objectives, risks, charges and expenses of the funds. Please carefully read the prospectus, which contains this and other important information, before making an investment decision.

Plan Name: TEST PLAN $26,504.42 as of 03/14/2022 Print

Loan Information Actions

Loan Balance: $2,000.00 Loan Available: $7,870.12

Loan ID	Outstanding Balance	Payment Frequency	Expected Payment	Payoff Date	Status	Next Payment Date	Repayment Method
1	$2,000.00	Bi-weekly	$34.62	02/01/2025	Deemed	03/27/2022	Payroll

Withdrawal

Type:

There is no withdr

Explore J.P. Morgan ... ng in retirement.

Model a Withdrawal

Overview

Select a reason for the withdrawal or distribution

3 Tell us what to do with your assets

4 Review your choices and finish

Select a reason for the withdrawal or distribution

Why are you requesting this withdrawal or distribution?

- Participant has pending transactions
- You currently have transaction activity that prevents you from requesting a distribution through this facility.
- There are no separation-from-service distribution types available for request.

(•) Staying in the plan, but making a withdrawal

Cancel Back Continue

NEED ASSISTANCE?

If you have questions, pleas ... a.m. to 6:00 p.m. EST.

Everyday 401(k) by J.P.Morgan

Plan Name: TEST PLAN $26,504.42 as of 03/14/2022 Print

Loan Information Actions

Loan Balance: $2,000.00 Loan Available: $7,870.12

Loan ID	Outstanding Balance	Payment Frequency	Expected Payment	Payoff Date	Status	Next Payment Date	Repayment Method
1	$2,000.00	Bi-weekly	$34.62	02/01/2025	Deemed	03/27/2022	Payroll

Withdrawal Information

Model a Withdrawal | Request a Withdrawal | View Available Amounts

Type:

There is no withdra

Explore J.P. Morgan ... spending in retirement.

Model a Withdrawal

Overview

Select a reason for the withdrawal or distribution

3 Tell us what to do with your assets

4 Review your choices and finish

Select a reason for the withdrawal or distribution

Select a withdrawal reason below:

Participant has pending transactions

You currently have transaction activity that prevents you from requesting a distribution through this facility.

- **Hardship Withdrawal** — Available Amount: **$17,983.13**
- **Qualified Birth Or Adoption** — You are requesting a distribution for the birth/adoption of a child. — Available Amount: **$17,983.13**

Cancel | Back | Continue

NEED ASSISTANCE?

If you have questions, please call 855-200-1230. The TTY is 711 followed by 855-200-1230. Representatives are available to assist you weekdays from 8:00 a.m. to 6:00 p.m. EST.

A prospectus for each fund available for investment under your plan is available by clicking on the Research Investments tab above or, if you are unable to access the funds' prospectus from the website, please contact your employer. Investors should carefully consider the investment objectives, risks, charges and expenses of the funds. Please carefully read the prospectus, which contains this and other important information, before making an investment decision.

Plan Name: TEST PLAN $26,504.42 as of 03/14/2022 Print

Loan Information Actions

Loan Balance: $2,000.00 Loan Available: $7,870.12

Loan ID	Outstanding Balance	Payment Frequency	Expected Payment	Payoff Date	Status	Next Payment Date	Repayment Method
1	$2,000.00	Bi-weekly	$34.62	02/01/2025	Deemed	03/27/2022	Payroll

Withdraw

Type:

There is no wi

Explore J.P. Mor ... ding in retirement.

Model a Withdrawal

Overview

Select a reason for the withdrawal or distribution

Tell us what to do with your assets

4 Review your choices and finish

Tell us what to do with your assets

Total Cash Withdrawal*	Total Remaining Account Balance*
$15,000.00	$2,983.13

*Estimated amounts based on the current market valuations of your assets.

Amount Needed: 15000 (Maximum Amount: $17,983.13)

☑ I have insufficient cash or other liquid assets to satisfy the need.

Before a hardship withdrawal distribution can be processed, you must acknowledge by selecting the checkbox that you have insufficient cash or other liquid assets to satisfy the need.

Calculate Estimates

The amount of your distribution will be the lesser amount of your need or the actual available hardship amount.

The standard 10% federal and any applicable state withholding will be taken on the taxable amount of the distribution unless specified otherwise. State withholding will not be applied if federal withholding is not elected, except for those states that are mandatory.

Continue Cancel Back

Loan Information Actions Loan Balance: $2,000.00 Loan Available: $7,870.12

Loan ID ... yment ...od

1 ...ll

Withdrawal Info...

Type:

There is no withdrawal h...

Explore J.P. Morgan Asse... ...g in retirement.

NEED ASSISTANCE?

If you have questions, please call ... a.m. to 6:00 p.m. EST.

A prospectus for each fund availa... please contact your employer. In... important information, before m... ...tus from the website, ...ontains this and other

...ivacy | Disclosures

Model a Withdrawal

Overview

Select a reason for the withdrawal or distribution

Tell us what to do with your assets

4 Review your choices and finish

Tell us what to do with your assets

Total Cash Withdrawal*	Total Remaining Account Balance*
$15,000.00	**$2,983.13**

**Estimated amounts based on the current market valuations of your assets.*

Amount Needed: 15000 (Maximum Amount: **$17,983.13**)

☑ I have insufficient cash or other liquid assets to satisfy the need.

Before a hardship withdrawal distribution can be processed, you must acknowledge by selecting the checkbox that you have insufficient cash or other liquid assets to satisfy the need.

The amount of your distribution will be the lesser amount of your need or the actual available hardship amount.

The standard 10% federal and any applicable state withholding will be taken on the taxable amount of the distribution unless specified otherwise. State withholding will not be applied if federal withholding is not elected, except for those states that are mandatory.

Federal Withholding:

Recommended federal withholding amount is 10.00% of the estimated taxable amount shown in the calculation detail.

- ◉ Percent: 10.00 %
- ○ Amount: $
- ○ Do not withhold Federal tax

State Withholding:

- ◉ Calculate state withholding
- ○ Manually enter state withholding
- State tax amount: $
- ○ Do not withhold State tax

Recalculate Estimates

Withdrawal Amount:	$15,000.00
Estimated Taxable Amount: $7,979.59	
Federal Withholding:	(797.96)
State Withholding:	(423.00)
	Estimated Cash Total: $13,779.04

Continue Cancel Back

Everyday 401(k) by J.P.Morgan

Plan Name: TEST PLAN $26,504.42 as of 03/14/2022 Print

Loan Information Actions

Loan Balance: $2,000.00 Loan Available: $7,870.12

Loan ID	Outstanding Balance	Payment Frequency	Expected Payment	Payoff Date	Status	Next Payment Date	Repayment Method
1	$2,000.00	Bi-weekly	$34.62	02/01/2025	Deemed	03/27/2022	Payroll

Withdrawal

Type:

There is no withdr

Explore J.P. Morgan ... pending in retirement.

Model a Withdrawal

Print

- Overview
- Select a reason for the withdrawal or distribution
- Tell us what to do with your assets
- Review your choices and finish

Review your choices

Withdrawal or distribution summary

Total Cash Withdrawal*	Total Remaining Account Balance*
$15,000.00	$2,983.13

Estimated amounts based on the current market valuations of your assets.

Your withdrawal or distribution reason

Request Reason:	Staying in the plan, but making a withdrawal
Request Type:	Hardship Withdrawal

Hardship Withdrawal

Withdrawal Amount:	$15,000.00
Estimated Taxable Amount: $7,979.59	
Federal Withholding:	(797.96)
State Withholding:	(423.00)
Estimated Cash Total:	$13,779.04

Back Close

NEED ASSISTANCE?

If you have questions, plea... a.m. to 6:00 p.m. EST.

...s | Privacy | Disclosures

A prospectus for each fund ... rospectus from the website, please contact your emplo... which contains this and other important information, be...

Everyday 401(k) by J.P.Morgan

Plan Name: **TEST PLAN** **$26,504.42** as of **03/14/2022**

Pending Transactions

Number	Description	Type	Trade Date	Amount
6715235	Exchange	Exchanges	03/15/2022	*

* Indicates Data Not Available While Pending

Statements & Transactions

View Statement

Show Filter

Summary Last 30 Days

Beginning Balance		$26,667.45
Contributions		$1,200.00
Employee	$800.00	
Employer	$400.00	
Distributions & Loans		$0.00
Loan Repayments		$0.00
Fees & Expenses		$0.00
Other		$3.91
Gain/Loss		-$1,366.94
Ending Balance		$26,504.42
Net Change		-$163.03

Beginning Balance: $26,667.45 as of 02/13/2022

Ending Balance: $26,504.42 as of 03/15/2022

Net Change: -$163.03

Transactions Last 30 Days

Download History | Print Table

Number	Description	Type	Trade Date	Processed Date	Amount	Status
1234	ACH Contribution	Contributions	03/09/2022	03/09/2022	$100.00	Confirmed
1234	ACH Contribution	Contributions	03/09/2022	03/09/2022	$100.00	Confirmed
1234	ACH Contribution	Contributions	03/09/2022	03/09/2022	$100.00	Confirmed
1234	ACH Contribution	Contributions	03/02/2022	03/02/2022	$100.00	Confirmed
1234	ACH Contribution	Contributions	03/02/2022	03/02/2022	$100.00	Confirmed
1234	ACH Contribution	Contributions	03/02/2022	03/02/2022	$100.00	Confirmed
100	Ordinary Dividend Reinvestment Increase	Adjustment	02/24/2022	02/24/2022	$1.31	Confirmed
100	Ordinary Dividend Reinvestment Increase	Adjustment	02/24/2022	02/24/2022	$1.50	Confirmed
100	Ordinary Dividend Reinvestment Increase	Adjustment	02/24/2022	02/24/2022	$1.10	Confirmed
1234	ACH Contribution	Contributions	02/23/2022	02/23/2022	$100.00	Confirmed
1234	ACH Contribution	Contributions	02/23/2022	02/23/2022	$100.00	Confirmed
1234	ACH Contribution	Contributions	02/23/2022	02/23/2022	$100.00	Confirmed
1234	ACH Contribution	Contributions	02/16/2022	02/16/2022	$100.00	Confirmed
1234	ACH Contribution	Contributions	02/16/2022	02/16/2022	$100.00	Confirmed

Everyday 401(k) by J.P.Morgan

Plan Name: TEST PLAN $26,504.42 as of 03/14/2022 Print

Pending Transactions

Number	Description	Type	Trade Date	Amount
6715235 *	Exchange	Exchanges	03/15/2022	*

* Indicates Data Not Available While Pending

Statements & Transactions

View Statement

Show Filter

Summary Last 30 Days

Beginning Balance

Contributions

Employee

Employer

Distributions & Loans

Loan Repayments

Fees & Expenses

Other

Gain/Loss

Ending Balance

Net Change

.667.45
f 02/13/2022

.504.42
f 03/15/2022

.163.03

View a Statement

Select statement type.

Verify and submit your request.

Select a Statement Type

- (•) View Online Statement
- ( ) Request Participant Activity Summary

Enter a date range

From 02/13/2022 To 03/15/2022

The date range must be between 01/01/2020 - 03/15/2022 and less than two years. The To date must be equal to or greater than the From date.

Cancel View Online

Transactions Last 30 Da

ory Print Table

Number	Des					Status
1234	ACH					Confirmed
1234	ACH Contribution	Contributions	03/09/2022	03/09/2022	$100.00	Confirmed
1234	ACH Contribution	Contributions	03/09/2022	03/09/2022	$100.00	Confirmed
1234	ACH Contribution	Contributions	03/02/2022	03/02/2022	$100.00	Confirmed
1234	ACH Contribution	Contributions	03/02/2022	03/02/2022	$100.00	Confirmed
1234	ACH Contribution	Contributions	03/02/2022	03/02/2022	$100.00	Confirmed
100	Ordinary Dividend Reinvestment Increase	Adjustment	02/24/2022	02/24/2022	$1.31	Confirmed
100	Ordinary Dividend Reinvestment Increase	Adjustment	02/24/2022	02/24/2022	$1.50	Confirmed
100	Ordinary Dividend Reinvestment Increase	Adjustment	02/24/2022	02/24/2022	$1.10	Confirmed
1234	ACH Contribution	Contributions	02/23/2022	02/23/2022	$100.00	Confirmed
1234	ACH Contribution	Contributions	02/23/2022	02/23/2022	$100.00	Confirmed
1234	ACH Contribution	Contributions	02/23/2022	02/23/2022	$100.00	Confirmed
1234	ACH Contribution	Contributions	02/16/2022	02/16/2022	$100.00	Confirmed
1234	ACH Contribution	Contributions	02/16/2022	02/16/2022	$100.00	Confirmed

Pending Tr...

Number | Amount

6715235 * | *

* Indicates Data Not ...

Statements | Show Filter

Summary Last 3...

Beginning Balance ...67.45 ...2/13/2022

Contributions ...04.42 ...3/15/2022

Employee

Employer

Distributions & Loans ...63.03

Loan Repayments

Fees & Expenses

Other

Gain/Loss

Ending Balance

Net Change

Transactions Las... | Print Table

Everyday 401(k) By J.P. Morgan
P.O. Box xxxx
Anytown, AB 12345-6789

Everyday 401(k) by JPM Logo

Retirement Account Update

July 1, 2019 - September 30, 2019

PLAN NAME

90 FP 1 B 1 1 A 10061 10061 **5 DGT
JOHN SMITH
PO BOX 1234
DELIVERY ADDRESS
DELIVERY ADDRESS
DELIVERY ADDRESS
DELIVERY ADDRESS
ANYTOWN, US 12345

Total Account Value *(as of 06/30/2019)*
$24,331.18

Your Retirement Account At A Glance

	During this Period	Calendar Year-to-Date
Beginning Value	$46,809.83	$37,472.22
+ Contributions**		
Employee Salary Deferral	1,300.00	3,900.00
Rollover into Plan	0.00	0.00
Employer Match	390.00	1,170.00
- Withdrawals	0.00	-126.00
+ Net Change*	-29.51	5,792.1
Ending Value	$48,208.32	$42,208.32
Personal Rate of Return[1]	-0.32%	15.55%
Estimated Monthly Income at Retirement[2]	$7,593.56	$7,593.56

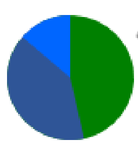
Contact Information

Customer Service:
Our customer service representatives are available from 8 a.m. to 6 p.m. EST at 855-200-1230

Online Service:
For your updated account values and to make address changes go to http://www.everyday401k.com

Representative
Joe Smith
1-800-441-7587 extn: 123
Joe.Smith@samplecompany.info

Your Asset Allocation



Allocation of Current Dollars	Investment Category/ Investment Option	Ending Value on 9/30/2019 ÷	Unit Value =	Total Units Held on 9/30/2019
47.27%	**Asset Allocation**			
47.27%	T. Rowe Price Retirement 2030 R	$22,788.78	$34.0903	668.4813
40.07%	**Large Cap Growth Stocks**			
17.08%	EQ/Large Cap Growth Managed Volatility	$8,234.04	$344.2165	23.9211
22.99%	T. Rowe Price Growth Stock R	$11,084.00	$95.1503	116.4892
12.66%	**Small Cap Stocks**			
12.66%	Federated Clover Small Value R	$6,101.50	$35.7381	170.7280
100.0%	**Total Asset Allocation**	$48,208.32		

Number						Status
1234						...nfirmed
1234						...nfirmed
1234						...nfirmed
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1234						...nfirmed
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1234	ACH Contribution	Contributions	02/16/2022	02/16/2022	$100.00	Confirmed

Everyday 401(k) by J.P.Morgan

Plan Name: TEST PLAN $26,504.42 as of **03/14/2022** Print

Contribution Information

Pre-Tax / Roth

Minimum:	0.00%
Maximum:	100.00%

Limits

Annual:	100.00% | $61,000.00
IRS Deferral Limit:	$20,500.00
Catch Up Available:	$6,500.00

Plan Loan Information

Minimum Loan Amount:	$1,000.00
Maximum Number Outstanding Loans:	99
Mortgage Loans Available:	Yes
Request Loans Online:	Yes
Interest Rate:	5.25%

Plan Contacts

Plan Sponsor

Test Sponsor
1234 MAIN ST
ANYTOWN ME 04860-0000
Test Contact

Phone: 555-555-5555
Fax:

NEED ASSISTANCE?

If you have questions, please call 855-200-1230. The TTY is 711 followed by 855-200-1230. Representatives are available to assist you weekdays from 8:00 a.m. to 6:00 p.m. EST.

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Everyday 401(k) by J.P.Morgan

Plan Name: TEST PLAN $26,504.42 as of 03/14/2022

Print

Available Investment Options

Change Investments

Print Table

View By: **Investment**

Select investments to compare

Compare Investments

Only show investments I own

Investment	Price
Core-Domestic Bonds	
JPMorgan Core Bond R6 Ticker: JCBUX	$11.200
Supplemental	
JPMorgan Emerging Markets Equity R6	$29.160
Core-Large Cap Domestic Equity	
JPMorgan Equity Income R6	$22.800
JPMorgan Equity Index R6	$62.800
Core-Domestic Bonds	
JPMorgan Government Bond R6	$10.390
Core-Large Cap Foreign Equity	
JPMorgan International Equity R6	$17.340
Allocation	

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- Access the enrollment guide
- Evaluate investment options
  - Provides information about funds, including prospectus viewing, monthly fund performance, and fund data sheets.
- Access important notices
  - Automatic contribution arrangement notices (ACA, EACA)
  - Qualified default investment alternative notice (QDIA)
  - Safe harbor notice
  - Summary plan description (SPD)
- Access relevant plan forms

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Plan Name: TEST PLAN $26,504.42 as of 03/14/2022 Print

X

Get retirement ready

Your employer has chosen Everyday 401(k) by J.P. Morgan to help you prepare for your future. These resources are designed to help you take advantage of your 401(k) and reach your retirement goals.

Enrollment guide — Learn more

Investments — Learn more

Important notices — Select a notice

Plan forms — Select a form

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If you ... closures

a.m. to 6:00 p.m. EST.

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