

## Quarterly Investment Review

*Guide to the Markets* has become one of the most relied upon sources for economic and market updates among financial professionals and the clients they serve. The insight and timeliness of the *Guide* continues to be an excellent source for keeping pace with the ever-changing financial environment.

J.P. Morgan Asset Management is pleased to present the *Quarterly Investment Review*. This review offers a suggested framework for discussing recent market and economic events in your reviews with plan sponsors, using slides from our *Guide to the Markets*.

The *Quarterly Investment Review* was developed to provide you with a way to address the markets and economy based on logic rather than emotion, supporting your efforts to help plan sponsors and their participants make rational investment decisions.

This presentation provides you with:

- suggested slides for use in a quarterly investment review
- an overview of economic and investment trends
- suggested talking points to use in conversations with plan sponsors

Each quarter, this review will provide key slides and talking points from the *Guide to the Markets* on:

### The economy

- Growth
- Jobs
- Profits
- Inflation

### Investment opportunities

- Stocks
- Bonds
- International
- Asset allocation and diversification



## Conducting the Quarterly Investment Review

The *Quarterly Investment Review* was designed to filter out the economic and market data that is relevant to the defined contribution marketplace. This single source of data can be utilized at your investment reviews with plan sponsors and the insights highlighted can be integrated into communications for plan participants. Making insightful market discussions the cornerstone of every investment review allows you to establish a more consistent, repeatable process that highlights the value you bring to your clients – laying the groundwork for addressing portfolio performance, reviewing asset allocation and making more informed investment decisions.

To learn more about the *Quarterly Investment Review* or any of the other retirement tools and resources from J.P. Morgan Asset Management, please contact your J.P. Morgan Client Advisor or a Retirement Specialist at 877-576-4632.

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