

# *Exhibit* – Material Changes to Client Relationship Summary

This Exhibit summarizes the following material changes to our Form CRS, last filed in June 2023, which provides more detailed information about our current business practices. The changes, as relates to the entire document and by section, are:

## Entire document

- Replaced all references of First Republic Investment Management (“FRIM”) with “J.P. Morgan Private Wealth Advisors LLC” or “Advisor” to indicate a name change of the registered investment adviser.
  - Removed all references to First Republic Securities Company (“FRSC”) and, where appropriate, references to brokerage services.
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## What investment services and advice can you provide me?

- Updated to remove references to FRSC.
  - Updated to remove references to “Eagle Invest” as the name of the online investment management platform.
  - Stated online investment management platform is closed to new accounts.
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## What are your legal obligations to me when acting as my investment adviser? How else does your firm make money, and what conflicts of interest do you have?

- Updated to state the Eagle Sweep Program is offered by JP Morgan Chase Bank, N.A. (“JPMCB”), through our introducing broker-dealer J.P. Morgan Securities LLC (“JPMS”).
  - Updated to state JPMCB and JPMS receive benefits from the Eagle Sweep program.
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