Access Your Statements & Tax Documents on J.P. Morgan's Tax Center

Features and Benefits

- View all your statements and tax documents in a single location.
- Set up multiple authorized users with customized access.
- Choose how long authorized users can access your documents (30, 60, 90, 180, 360 days).
- Consolidate statements and tax documents into a single PDF file or .zip folder for easy access.
- Access and download up to 7 years of documents.

Get Started:

At **jpmorganonline.com**:
Go to "Statements & documents," then choose "Statement & tax center"

To Set Up User Access

From "Statements & documents" > Choose "Statement & tax center" > Under "Share access to my statements and tax documents" click "Get Started" > then review and accept the service agreement.

To Add Users

You can add a new user at any time by choosing "Add User" on the shared access dashboard.

1. Enter their information and set access time period (30, 60, 90, 180, 360 days), choose "Next." (If another client has already enrolled this user with the same email, you can either continue enrolling them using that email to also give them access to your documents, or create a new log in with a different email.)
2. Choose the documents you'd like to share (by year, account, document type and access period), and then "Assign." (Users will receive a notification that you've given them access to your statements and tax documents.)

When you set up a new user, you can create a user ID for them, or we will automatically generate one. New users will receive a temporary password to sign in to **www.jpmpb.com**; you're responsible for giving them their user ID. Their user ID appears when you expand their profile on the shared access dashboard.

Add or Remove User Document Access

1. Pick the user you wish to edit in the "Users with shared access to my documents" dashboard.
2. To add access to more accounts, choose "New" next to Statements and Tax documents shared. (Users will receive a notification that you've given them additional access.)
3. To remove access from documents that you've previously shared with a user, choose "Remove."

Edit User Profile Information

1. Choose "Edit" next to the user you wish to update in "Users with shared access to my documents."
2. Change how long you'd like access for (30, 60, 90, 180, 360 days), then choose "Save."
3. To remove a user, choose "Remove."
4. To reset a user's password, choose "Reset Pwd." (Users will receive a notification that you've changed their password.)

If you have any questions, please call us at 1-866-265-1727 (Private Bank) or 1-888-807-6898 (J.P. Morgan Wealth Management), Monday–Friday from 8 AM to 9 PM and Saturday–Sunday from 9 AM to 5 PM ET.

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