On behalf of the Advice Lab at J.P. Morgan
You are invited to participate in a special conference call

New rules for family offices under Dodd-Frank
Tuesday, January 10, 2012 at 11:00 a.m. Eastern Time

Moderated by

Thomas McGraw, The Advice Lab at J.P. Morgan

Our distinguished panelists include:

Leor Landa
Davis Polk & Wardwell LLP

Miles Padgett
Kozusko Harris Duncan

Jeffrey Schwartz
Davis Polk & Wardwell LLP

John P.C. Duncan
Kozusko Harris Duncan

New rules now in effect change the exemption that many family offices once relied upon to be exempt from registering as an investment advisor with the U.S. Securities and Exchange Commission. Some family offices still will not be required to file, but others may be. Family offices that are no longer exempt should consider alternatives—or register with the SEC to meet a March 30, 2012 deadline.

To learn more, join us to hear our panel of experts discuss:

- Which family offices are impacted
- How they can qualify for the new exemption
- Options to consider if your office does not qualify for the exemption

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ASK QUESTIONS
There will be a Q&A session at the end of the discussion. We also invite you to submit any questions you would like us to address during the call on the web player or via email to private_banking@jpmorgan.com and please copy your J.P. Morgan representative.

VIEW SLIDES AND HEAR THE AUDIO ON YOUR COMPUTER
To register for the webcast and to access the presentation during the call, please go to:
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