

# **Bond Case Briefs**

*Municipal Finance Law Since 1971*

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## **J.P. Morgan Launches New Digital Bond Ladder Tool.**

### **Helps financial advisors build hypothetical bond ladders tailored to help meet client needs**

NEW YORK, May 8, 2019 /PRNewswire/ — J.P. Morgan Asset Management today announced the launch of [\*Bond Ladder Illustrator\*](#), a new tool for financial advisors to create hypothetical municipal bond ladders based on customizable inputs such as tax rates, credit quality, maturity ranges and interest rate views.

Powered by an engine built in partnership with Asset and Wealth Management's Intelligent Digital Solutions group, the tool provides advisors with the unique opportunity to create hypothetical bond ladders based on actual municipal bonds that have gone through J.P. Morgan's extensive credit review process, rather than generic benchmark interest rate curves.

"Using actual municipal bonds that have made it into J.P. Morgan's portfolios enables the tool's output to be more indicative of what a client would actually get if they choose to build a ladder portfolio with us," said Rick Taormina, Head of Tax Aware Strategies at J.P. Morgan Asset Management.

Some of the tool's key features include a tax rate calculator, customizable portfolio assumptions based on client preferences, and a personalized, end-client ready report that includes key portfolio characteristics, estimated investment returns, income, cash flow and total return metrics.

Bond Ladder Illustrator is the latest addition to J.P. Morgan's suite of digital portfolio construction tools as the firm continues to deliver sophisticated digital capabilities to financial advisors, said Andrea Lisher, Head of the Americas for J.P. Morgan's Global Funds business.

"This is another great example of how we're investing in leading-edge tools to help financial advisors build stronger portfolios for their clients," Lisher said.

"Like our digital Portfolio Analysis and Investment Comparison tools, Bond Ladder Illustrator combines the 'power under the hood' of J.P. Morgan's insight and expertise with 24/7 convenience and an easy-to-use interface that gives advisors what they need in just a few, simple clicks."

Advisors can access the Bond Ladder Illustrator at [jpmorgan.com/bondladder](https://jpmorgan.com/bondladder).

### **About J.P. Morgan's Municipal Bond Investing Team**

With over \$69 billion in municipal bond assets, J.P. Morgan's dedicated investment team and seasoned credit analysts have managed municipal bonds through a range of credit and market cycles for more than 35 years. The firm offers a broad range of municipal bond solutions across the duration and quality spectrums designed to meet an individual's unique circumstances including risk tolerance, cash flow needs, tax status and investment horizon.

### **About J.P. Morgan Asset Management**

J.P. Morgan Asset Management, with assets under management of \$1.7 trillion (as of March 31, 2019), is a global leader in investment management. J.P. Morgan Asset Management's clients include institutions, retail investors and high net worth individuals in every major market throughout the world. J.P. Morgan Asset Management offers global investment management in equities, fixed income, real estate, hedge funds, private equity and liquidity. J.P. Morgan Asset Management is the marketing name for the asset management businesses of JPMorgan Chase & Co. (NYSE: JPM), and its affiliates worldwide.

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May 08, 2019, 13:00 ET