



JPMorgan Chase Bank, N.A.
P O Box 182051
Columbus, OH 43218 - 2051

February 07, 2025 through March 06, 2025

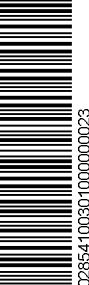
Primary Account: **000000714245263**

CUSTOMER SERVICE INFORMATION

Web site: **Chase.com**
Service Center: **1-800-935-9935**
Para Espanol: **1-877-312-4273**
International Calls: **1-713-262-1679**
We accept operator relay calls

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LIZ ERICKSON
CHRIS ERICKSON
2425 DELMAR DR
PLANO TX 75075-7489



We're introducing new security measures for certain wire transfers when using our digital banking services

To help protect your account, you may be required to use a trusted device to send certain wire transfers when using chase.com or the Chase Mobile® app.¹ Here are the key changes that will be effective May 8, 2025:

- **Use of Trusted Devices:** You'll need to use a trusted device to send certain wire transfers using our digital banking services. A trusted device is a smartphone that has been enrolled with us based on specific criteria.
- **Enrolling a Device:** You may already be using a trusted device. If not, you'll receive step-by-step instructions to make your device trusted the next time you initiate a wire transfer that requires it. You'll need to use a smartphone with the Chase Mobile® app installed and fulfill certain identification requirements, such as scanning and uploading a copy of your driver's license or state ID.
- **Restrictions on Wire Transfers:** If you don't have a trusted device, you may not be able to add recipients or initiate certain wire transfers using our digital banking services. This won't affect your ability to initiate wires at a Chase branch or J.P. Morgan Financial Center.

Where to Find More Information

These policy updates are effective May 8, 2025, and will be detailed in Section 3 of the *Online Wire Transfer and Chase Global Transfer Services Addendum*, which may appear as a separate agreement or as an Addendum to the Digital Services Agreement.

You can review the new requirements in those agreements beginning February 20, 2025. Here's how to access them:

- **On chase.com:** Log in to your account, click on the Main Menu, and select "Agreements & Disclosures."
- **On the Chase Mobile® app:** Go to "Legal Information" in Profile & Settings or at the bottom of the home page, then select "Legal Agreements and Disclosures."

If you have any questions, please call the number listed on this statement.

¹Chase Mobile® app is available for select mobile devices. Message and data rates may apply.

CONSOLIDATED BALANCE SUMMARY

ASSETS

Checking & Savings

	ACCOUNT	BEGINNING BALANCE THIS PERIOD	ENDING BALANCE THIS PERIOD
Chase Total Checking	000000714245263	\$1,150.89	\$1,938.08
Chase Savings	000001197017229	638.88	906.87
Total		\$1,789.77	\$2,844.95



February 07, 2025 through March 06, 2025
Primary Account: 000000714245263

CONSOLIDATED BALANCE SUMMARY (continued)

TOTAL ASSETS	\$1,789.77	\$2,844.95
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CHASE TOTAL CHECKING

LIZ ERICKSON Account Number: 000000714245263
CHRIS ERICKSON

CHECKING SUMMARY

	AMOUNT
Beginning Balance	\$1,150.89
Deposits and Additions	10,507.97
Checks Paid	-350.00
ATM & Debit Card Withdrawals	-1,727.26
Electronic Withdrawals	-7,643.52
Ending Balance	\$1,938.08

Your account ending in 7229 is linked to this account for overdraft protection.

DEPOSITS AND ADDITIONS

DATE	DESCRIPTION	PPD ID	AMOUNT
02/12	SSA Treas 310 Xxsoc Sec	PPD ID: 9031736042	\$3,641.00
02/12	SSA Treas 310 Xxsoc Sec	PPD ID: 9031736042	1,716.00
02/19	Pershing Brokerage	PPD ID: 1132741729	3,000.00
02/19	Pershing Brokerage	PPD ID: 1132741729	500.00
02/19	Pershing Brokerage	PPD ID: 1132741729	500.00
02/28	Northwestern Mu Income Pmt	PPD ID: 9000596898	931.09
02/28	Northwestern Mu Income Pmt	PPD ID: 9000596898	145.78
03/03	New York Life IN Pn Pmts/Cp	PPD ID: 1043581074	74.10
Total Deposits and Additions			\$10,507.97

CHECKS PAID

CHECK NO.	DESCRIPTION	DATE PAID	AMOUNT
2867 ^		02/19	\$70.00
2868 ^		02/18	130.00
2869 ^		02/28	20.00
2870 ^		03/03	130.00
Total Checks Paid			\$350.00

If you see a description in the Checks Paid section, it means that we received only electronic information about the check, not the original or an image of the check. As a result, we're not able to return the check to you or show you an image.

^ An image of this check may be available for you to view on Chase.com.

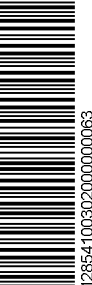


February 07, 2025 through March 06, 2025

Primary Account: 000000714245263

ATM & DEBIT CARD WITHDRAWALS

DATE	DESCRIPTION	AMOUNT
02/07	Card Purchase 02/06 Taco Bell # '029885 Plano TX Card 4396	\$9.93
02/07	Card Purchase 02/06 Taco Bell # '029885 Plano TX Card 4396	5.94
02/07	Card Purchase With Pin 02/07 Kroger #0581 2925 Cust Plano TX Card 7840	80.08
02/10	Card Purchase 02/08 Chipotle 3558 Mckinney TX Card 7840	10.28
02/10	ATM Withdrawal 02/08 5201 W University DR Mckinney TX Card 7840	60.00
02/11	Card Purchase With Pin 02/11 Costco Gas #0664 East Plano TX Card 7840	30.33
02/11	Card Purchase With Pin 02/11 Costco Whse #0664 Plano TX Card 7840	36.61
02/12	Card Purchase 02/11 LA Madeleine #062 Plano TX Card 7840	30.46
02/12	Card Purchase 02/11 LA Madeleine #062 Plano TX Card 7840	5.43
02/12	Card Purchase With Pin 02/12 Kroger #0581 2925 Cust Plano TX Card 7840	28.86
02/12	ATM Withdrawal 02/12 3041 W Parker Rd Plano TX Card 4396	200.00
02/13	Card Purchase 02/11 The Home Depot #6833 Plano TX Card 4396	8.10
02/18	Card Purchase 02/14 Tst*Toasted Walnut Tabl Celina TX Card 7840	19.51
02/18	Card Purchase 02/15 Cinemark 251 Rstbar Plano TX Card 4396	15.19
02/18	Card Purchase With Pin 02/16 Wal-Mart #3482 Plano TX Card 7840	63.83
02/18	Card Purchase With Pin 02/16 H-E-B #790 Plano TX Card 7840	78.67
02/18	Card Purchase 02/17 019 Torchys Preston Ale Dallas TX Card 7840	7.44
02/18	Card Purchase With Pin 02/18 Central Market #546 Plano TX Card 7840	38.25
02/21	Card Purchase With Pin 02/21 H-E-B #790 Plano TX Card 7840	66.21
02/24	Card Purchase With Pin 02/23 Marshalls #0105 Dallas TX Card 7840	43.25
02/24	Card Purchase With Pin 02/23 Homegoods #450 Richardson TX Card 7840	20.54
02/24	Card Purchase With Pin 02/23 Homegoods #450 Richardson TX Card 7840	5.40
02/25	Card Purchase With Pin 02/25 Target T-1489 Garland TX Card 7840	24.89
02/25	Card Purchase With Pin 02/25 Costco Gas #0664 East Plano TX Card 7840	35.21
02/25	Card Purchase With Pin 02/25 Costco Whse #0664 Plano TX Card 7840	70.35
02/25	Card Purchase With Pin 02/25 The Home Depot #6833 Plano TX Card 7840	19.42
02/25	ATM Withdrawal 02/25 2000 W 15th St Plano TX Card 4396	260.00
02/26	Card Purchase With Pin 02/26 Spec's Liquor #1 1839 Allen TX Card 7840	42.19
02/26	Card Purchase With Pin 02/26 Kroger #0581 2925 Cust Plano TX Card 7840	17.82
02/27	Card Purchase 02/26 Qdoba 2026 Richardson TX Card 7840	10.77
02/27	Card Purchase 02/26 Lupe Tortilla 27 469-6601576 TX Card 7840	25.48
02/27	Recurring Card Purchase 02/27 Abc*Crunch Fitness 469-7971105 TX Card 7840	34.71
02/27	Card Purchase With Pin 02/27 Randalls #1066 Houston TX Card 7840	18.39
02/28	Card Purchase 02/27 Mcdonald's F5250 Corsicana TX Card 7840	10.08
03/03	Card Purchase 02/27 Whitewater Carwash Wx02 Plano TX Card 7840	11.00
03/03	Card Purchase 02/28 Sp The Brookwood Com 128-13752174 TX Card 7840	29.06
03/03	Card Purchase 02/28 Sp The Brookwood Com 128-13752174 TX Card 7840	8.61
03/03	Card Purchase With Pin 03/02 Buc-Ee's #26 Outside Madisonville TX Card 7840	22.44
03/03	Card Purchase With Pin 03/02 Buc-Ee's #26 Madisonville TX Card 7840	12.63
03/04	Card Purchase With Pin 03/04 H-E-B #790 Plano TX Card 7840	132.07
03/05	Card Purchase 03/04 Pike&Pine St2275 Seattle WA Card 4396	8.39
03/06	Card Purchase 03/04 Little Greek Fresh Grill Plano TX Card 7840	8.86
03/06	Card Purchase With Pin 03/06 Homegoods #450 Richardson TX Card 7840	32.45
03/06	Card Purchase With Pin 03/06 Marshalls #0105 Dallas TX Card 7840	28.13
Total ATM & Debit Card Withdrawals		\$1,727.26





February 07, 2025 through March 06, 2025
Primary Account: **000000714245263**

ELECTRONIC WITHDRAWALS

DATE	DESCRIPTION	AMOUNT
02/10	Zelle Payment To Linda Federle Jpm99Akr0V0	\$55.28
02/12	02/12 Online Payment 23682464450 To Allstate	406.03
02/12	02/12 Online Transfer To Sav ...7229 Transaction#: 23700629825	1,000.00
02/12	02/12 Online Payment 23700631424 To Frontier Communications	124.00
02/12	Zelle Payment To O.D.A.A.T. Jpm99Axwbbwl	20.00
02/12	02/12 Online Payment 23700677691 To Usaa Credit Card	1,000.00
02/13	02/13 Online Payment 23704678301 To Chase Cardmember Service	1,000.00
02/18	Gefcu PPD PPD ID: 1314977214	417.58
02/18	02/18 Online Payment 23767160942 To City of Plano	105.67
02/19	02/19 Online Payment 23781109742 To Chase Cardmember Service	1,000.00
02/19	02/19 Online Payment 23781122696 To Usaa Credit Card	1,000.00
02/19	02/19 Online Payment 23781125739 To Atmos Energy	224.41
02/19	02/19 Online Payment 23781135292 To Allstate	324.00
02/19	Mp2 Energy Texas Elec Rep 4021388 Web ID: 0000332638	168.86
02/20	Kera Donation PPD ID: 1752084961	50.00
02/28	Tesla Motors Tesla Moto PPD ID: 5912197729	10.81
03/04	Northwestern Mu lsa Pyment PPD ID: 9000596067	374.25
03/04	Aetna Health Ins Ins Pymt PPD ID: 6066033492	170.12
03/04	Sparrowhawk Sola Echeckpay PPD ID: F472574800	18.84
03/06	Humana, Inc. Ins Pymt PPD ID: 9040604802	127.21
03/06	Goldenrule Ins Prem PPD ID: 1376028756	46.46
Total Electronic Withdrawals		\$7,643.52

A Monthly Service Fee was **not** charged to your Chase Total Checking account. Here are the three ways you can avoid this fee during any statement period.

- **Have electronic deposits made into this account totaling \$500.00 or more, such as payments from payroll providers or government benefit providers, by using (i) the ACH network, (ii) the Real Time Payment or FedNowSM network, or (iii) third party services that facilitate payments to your debit card using the Visa or Mastercard network.**
(Your total electronic deposits this period were \$11,646.15. Note: some deposits may be listed on your previous statement)
- **OR, keep a balance at the beginning of each day of \$1,500.00 or more in this account.**
(Your lowest beginning day balance was \$862.44)
- **OR, keep an average beginning day balance of \$5,000.00 or more in qualifying linked deposits and investments.**
(Your average beginning day balance of qualifying linked deposits and investments was \$3,537.72)



February 07, 2025 through March 06, 2025
Primary Account: 00000714245263

CHASE SAVINGS

CHRIS ERICKSON
OR LIZ ERICKSON

Account Number: 000001197017229

SAVINGS SUMMARY

	AMOUNT
Beginning Balance	\$638.88
Deposits and Additions	1,000.01
Electronic Withdrawals	-732.02
Ending Balance	\$906.87
Annual Percentage Yield Earned This Period	0.01%
Interest Paid This Period	\$0.01
Interest Paid Year-to-Date	\$0.04

Interest paid in 2024 for account 000001197017229 was \$0.58.

TRANSACTION DETAIL

DATE	DESCRIPTION	AMOUNT	BALANCE
	Beginning Balance		\$638.88
02/12	Online Transfer From Chk ...5263 Transaction#: 23700629825	1,000.00	1,638.88
03/03	Northwestern Mu lsa Pymnt PPD ID: 9000596067	-732.02	906.86
03/06	Interest Payment	0.01	906.87
	Ending Balance		\$906.87

A monthly Service Fee was **not** charged to your Chase Savings account. You can continue to avoid this fee during any statement period by keeping a minimum daily balance in your account of \$300.00 or more.
(Your minimum daily balance was \$638)

IN CASE OF ERRORS OR QUESTIONS ABOUT YOUR ELECTRONIC FUNDS TRANSFERS:

Call us at 1-866-564-2262 or write us at the address on the front of this statement immediately if you think your statement or receipt is incorrect or if you need more information about a transfer listed on the statement or receipt.

For personal accounts only: We must hear from you no later than 60 days after we sent you the FIRST statement on which the problem or error appeared. Be prepared to give us the following information:

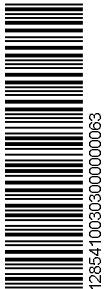
- Your name and account number;
- A description of the error or the transaction you are unsure about, and why you think it is an error or want more information; and
- The amount of the suspected error.

We will investigate your complaint and will correct any error promptly. If we take more than 10 business days (or 20 business days for new accounts) to do this, we will credit your account for the amount you think is in error so that you will have use of the money during the time it takes us to complete our investigation.

For business accounts, see your deposit account agreement or other applicable agreements that govern your account for details.

IN CASE OF ERRORS OR QUESTIONS ABOUT NON-ELECTRONIC FUNDS TRANSFERS: Contact us immediately if your statement is incorrect or if you need more information about any non-electronic funds transfers on this statement. For more details, see your deposit account agreement or other applicable agreements that govern your account.

JPMorgan Chase Bank, N.A. Member FDIC





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