



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

June 07, 2023 through July 07, 2023

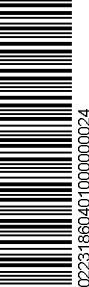
Primary Account: **000000714245263**

## 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

00223186 DRE 201 219 18923 NNNNNNNNNN 1 000000000 04 0000

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



## You now have more time to let us know about certain check errors on your account

In June we increased the timeframe for when you can make a claim for checks drawn on your account that have either been altered or that you did not authorize. You now have up to 60 days from when we make a statement available to make a claim on these items in order to be considered for reimbursement.

We've updated the **Safeguarding Your Information** section in our Deposit Account Agreement to reflect this change as well as provide additional information about our check claims process.

As a reminder, we offer tools to help you keep an eye on your account, including the Chase Mobile<sup>®</sup> app<sup>1</sup> and Chase Online<sup>SM</sup> Banking. You can find more useful tips for helping protect you and your money at [chase.com/FraudAwareness](https://chase.com/FraudAwareness).

If you'd like a copy of the Deposit Account Agreement, please visit [chase.com/disclosures](https://chase.com/disclosures) or call us at the number on this statement. We also accept operator relay calls.

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

## Please review our overdraft service options at the end of this statement

We've included our overdraft services and fees that are available for your personal checking account(s) at the end of this statement. As a reminder, overdraft services are not available for Chase Secure Checking<sup>SM</sup> or Chase First Checking<sup>SM</sup>. Standard Overdraft Practice and Chase Debit Card Coverage<sup>SM</sup> are not available for Chase High School Checking<sup>SM</sup>.

If you have questions, please visit [chase.com/overdraft](https://chase.com/overdraft) or call us at the number on this statement. We accept operator relay calls.

## Scammers may target the checks you mail

Use Chase Online<sup>SM</sup> Bill Pay to securely pay your bills on [chase.com](https://chase.com) or through the Chase Mobile<sup>®</sup> app as another way to pay, which may help you be less vulnerable to fraud.

Visit [chase.com/PayDigitally](https://chase.com/PayDigitally)

Chase Online<sup>SM</sup> Bill Pay: Must enroll in Chase Online<sup>SM</sup> Banking and activate Online Bill Pay. Certain restrictions and other limitations may apply.

Chase Mobile<sup>®</sup> app is available for select mobile devices. Message and data rates may apply.



June 07, 2023 through July 07, 2023  
Primary Account: 000000714245263

## CONSOLIDATED BALANCE SUMMARY

### ASSETS

Checking & Savings	ACCOUNT	BEGINNING BALANCE THIS PERIOD	ENDING BALANCE THIS PERIOD
Chase Total Checking	000000714245263	\$994.70	\$932.37
Chase Savings	000001197017229	3,934.25	2,325.83
<b>Total</b>		<b>\$4,928.95</b>	<b>\$3,258.20</b>
<b>TOTAL ASSETS</b>		<b>\$4,928.95</b>	<b>\$3,258.20</b>

## CHASE TOTAL CHECKING

LIZ ERICKSON

Account Number: 000000714245263

CHRIS ERICKSON

## CHECKING SUMMARY

	AMOUNT
<b>Beginning Balance</b>	<b>\$994.70</b>
Deposits and Additions	9,204.46
Checks Paid	-343.81
ATM & Debit Card Withdrawals	-1,873.39
Electronic Withdrawals	-7,049.59
<b>Ending Balance</b>	<b>\$932.37</b>

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

## DEPOSITS AND ADDITIONS

DATE	DESCRIPTION	AMOUNT
06/09	Online Transfer From Sav ...7229 Transaction#: 17582171817	\$800.00
06/14	SSA Treas 310 Xxsoc Sec PPD ID: 9031736042	3,452.00
06/14	SSA Treas 310 Xxsoc Sec PPD ID: 9031736042	1,616.60
06/14	Metlife Inc Dv02Dt2306 PPD ID: 2431912740	23.92
06/16	Pershing Brokerage PPD ID: 1132741729	1,000.00
06/16	Pershing Brokerage PPD ID: 1132741729	500.00
06/16	Pershing Brokerage PPD ID: 1132741729	500.00
06/20	ATM Check Deposit 06/18 2000 W 15th St Plano TX Card 3978	103.00
06/22	ATM Check Deposit 06/22 2000 W 15th St Plano TX Card 3978	110.00
06/29	Offer: Kroger (Gas&Conv.)	2.28
06/30	Northwestern Mu Income Pmt PPD ID: 9000596898	880.35
06/30	Northwestern Mu Income Pmt PPD ID: 9000596898	140.21
07/03	New York Life IN Pn Pmts/Cp PPD ID: 1043581074	74.10
07/06	Offer: Panera Bread (Incl. St. Louis Bread CO.)	2.00
<b>Total Deposits and Additions</b>		<b>\$9,204.46</b>



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## CHECKS PAID

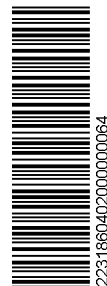
CHECK NO.	DESCRIPTION	DATE PAID	AMOUNT
2779 ^		06/08	\$13.81
2780 ^		06/13	130.00
2781 ^		06/27	70.00
2782 ^		06/26	130.00
Total Checks Paid			\$343.81

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.

## ATM & DEBIT CARD WITHDRAWALS

DATE	DESCRIPTION	AMOUNT
06/07	Card Purchase With Pin 06/07 Pga Tour Pga Tour Sup Plano TX Card 4396	\$8.65
06/07	Card Purchase With Pin 06/07 Micro Electronic 13929 Dallas TX Card 4396	16.23
06/08	Card Purchase 06/07 Tst* Velvet Taco - Dfw Richardson TX Card 4396	8.38
06/08	Card Purchase With Pin 06/08 Academy Sports & Outdo Plano TX Card 3978	35.16
06/08	Card Purchase With Pin 06/08 Kroger #0 2925 Custer Plano TX Card 3978	65.00
06/08	ATM Withdrawal 06/08 2000 W 15th St Plano TX Card 4396	200.00
06/08	Card Purchase With Pin 06/08 Nst The Home Depot 002 Plano TX Card 3978	24.88
06/09	Card Purchase 06/08 Mooyah - 172 Plano TX Card 4396	24.54
06/09	Card Purchase 06/08 Snack Soda Vending Plano TX Card 4396	10.00
06/09	Card Purchase With Pin 06/09 Marshalls 1603 Preston W. Plano TX Card 3978	40.03
06/12	Card Purchase With Pin 06/10 Central Market #546 Plano TX Card 4396	46.30
06/12	Card Purchase With Pin 06/10 H-E-B #790 Plano TX Card 3978	117.39
06/12	Card Purchase With Pin 06/10 Kroger #0581 2925 Cust Plano TX Card 4396	5.88
06/12	Card Purchase With Pin 06/10 Kroger #0581 2925 Cust Plano TX Card 3978	3.19
06/12	Card Purchase 06/11 Snack Soda Vending Plano TX Card 4396	10.00
06/12	Card Purchase With Pin 06/12 Rei #95 Plano Plano TX Card 4396	16.18
06/13	Card Purchase 06/13 Tst* Velvet Taco - Dfw Plano TX Card 4396	8.88
06/14	Card Purchase 06/13 Tst* Country Burger - P Plano TX Card 4396	22.75
06/14	Card Purchase With Pin 06/14 Kroger #0 2925 Custer Plano TX Card 3978	66.40
06/16	Card Purchase 06/15 Cvs/Pharmacy #10479 Plano TX Card 4396	3.78
06/20	Card Purchase With Pin 06/17 Racetrac135 Plano TX Card 3978	33.02
06/20	Card Purchase 06/18 Tacodeli Preston 010 Plano TX Card 4396	22.08
06/20	ATM Withdrawal 06/18 2000 W 15th St Plano TX Card 3978	60.00
06/20	Card Purchase 06/19 The UPS Store 6691 214-5633283 TX Card 3978	27.13
06/20	Card Purchase With Pin 06/19 Kroger #0 2925 Custer Plano TX Card 3978	40.57
06/20	Card Purchase 06/19 Silver Star Car Wash Plano TX Card 3978	25.00
06/20	Card Purchase With Pin 06/20 Tom Thumb #2554 Plano TX Card 3978	23.04
06/20	Card Purchase With Pin 06/20 Costco Whse #0684 Plano TX Card 3978	47.87
06/22	Card Purchase 06/21 Little Greek Fresh Gri 972-2349191 TX Card 4396	25.40
06/23	Card Purchase 06/22 Starbucks Store 3475 Allen TX Card 3978	7.14
06/26	Card Purchase 06/23 Taco Bell # '029885 Plano TX Card 4396	11.65
06/26	Card Purchase 06/23 Cinemark Theatres 231 Plano TX Card 4396	11.38
06/26	Card Purchase With Pin 06/24 H-E-B #790 Plano TX Card 3978	97.72
06/26	Card Purchase 06/24 Ls The Golf Ranch At U 972-4803600 TX Card 4396	17.32
06/26	Card Purchase 06/25 Tacodeli Preston 010 Plano TX Card 4396	21.60
06/26	ATM Withdrawal 06/25 4001 W Park Blvd Plano TX Card 4396	200.00
06/26	Card Purchase 06/25 Ls The Golf Ranch At U 972-4803600 TX Card 4396	17.32
06/26	Card Purchase With Pin 06/26 Tom Thumb #3641 Richardson TX Card 4396	5.17





June 07, 2023 through July 07, 2023  
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## ATM & DEBIT CARD WITHDRAWALS (continued)

DATE	DESCRIPTION	AMOUNT
06/26	Card Purchase With Pin 06/26 Hobbylobb 900A W. 15th Plano TX Card 3978	29.71
06/26	Card Purchase With Pin 06/26 Kroger Fuel Ctr 2925 C Plano TX Card 3978	45.63
06/27	Card Purchase 06/26 104 Braums Store Plano TX Card 3978	4.74
06/28	Card Purchase 06/27 Starbucks Store 58508 Allen TX Card 3978	6.90
06/28	Card Purchase 06/27 Chipotle 2036 Dallas TX Card 3978	9.96
06/29	Card Purchase 06/29 Ls The Golf Ranch At U 972-4803600 TX Card 4396	17.32
06/29	Card Purchase With Pin 06/29 The Home Depot 6833 Plano TX Card 3978	56.53
06/30	Card Purchase With Pin 06/30 The Home Depot #0527 Plano TX Card 4396	8.63
06/30	Card Purchase With Pin 06/30 The Home Depot #0524 Lewisville TX Card 4396	7.01
06/30	Card Purchase With Pin 06/30 Office De 909 N Centra Plano TX Card 3978	16.24
06/30	Card Purchase With Pin 06/30 Marshalls 721 Central Plano TX Card 3978	20.57
07/03	Card Purchase 07/01 Marshalls #0641 W. Plano TX Card 3978	10.81
07/03	Card Purchase With Pin 07/01 Market Street 5 Plano TX Card 3978	23.34
07/03	Card Purchase 07/01 The UPS Store 6691 214-5633283 TX Card 3978	15.55
07/03	Card Purchase With Pin 07/02 The Home Depot 6833 Plano TX Card 4396	51.66
07/03	Card Purchase With Pin 07/02 The Home Depot 6833 Plano TX Card 4396	10.81
07/03	Card Purchase 07/02 Tommy Terrifics Carwash Plano TX Card 3978	35.00
07/03	Card Purchase 07/02 Panera Bread #606060 K Plano TX Card 3978	24.20
07/03	Card Purchase With Pin 07/02 The Home Depot #0539 Plano TX Card 4396	6.08
07/03	Card Purchase With Pin 07/02 The Home Depot 6833 Plano TX Card 4396	9.55
07/05	Card Purchase 07/03 Taco Bell 038819 Ardmore OK Card 3978	7.39
07/05	Recurring Card Purchase 07/04 Netflix.Com Netflix.Com CA Card 3978	16.77
07/07	Card Purchase 07/06 Love's #177 Towanda KS Card 3978	1.94
07/07	Card Purchase 07/06 Freddy's 112-0004 Ardmore OK Card 3978	10.02
Total ATM & Debit Card Withdrawals		\$1,873.39

## ELECTRONIC WITHDRAWALS

DATE	DESCRIPTION	AMOUNT
06/08	06/08 Online Payment 17552918084 To Allstate	\$370.00
06/13	06/13 Online Payment 17614464270 To Bank of America Visa	4.00
06/13	Zelle Payment To Cindy's Corner Cards Jpm999Xwmu5A	17.50
06/14	06/14 Online Payment 17582184418 To Frontier Communications	245.50
06/15	06/15 Online Payment 17629519443 To Usaa Credit Card	1,000.00
06/15	06/15 Online Payment 17629561335 To Chase Cardmember Service	1,000.00
06/15	06/15 Online Payment 17629556152 To City of Plano	89.87
06/15	06/15 Online Payment 17629599737 To The Dallas Morning News	79.93
06/15	Mp2 Energy Texas Elec Rep 9208630 Web ID: 0000332638	23.95
06/20	Gefcu PPD PPD ID: 1314977214	417.58
06/20	Kera Donation PPD ID: 1752084961	50.00
06/20	Wellcare ACH Debits PPD ID: 9000147856	11.10
06/20	06/19 Online Payment 17666947559 To Usaa Credit Card	1,000.00
06/20	06/19 Online Payment 17666982060 To Chase Cardmember Service	1,000.00
06/22	06/22 Online Payment 17691322996 To Usaa Credit Card	200.00
06/22	06/22 Online Payment 17691324575 To Atmos Energy	40.89
06/27	Zelle Payment To Cindy's Corner Cards Jpm999Yi4Btc	36.35
06/28	Tesla Motors Tesla Moto PPD ID: 5912197729	10.81
07/03	07/02 Online Payment 17783880140 To Allstate	315.00
07/05	Northwestern Mu Isa Pymt PPD ID: 9000596067	374.25
07/05	Aetna Health Ins Ins Pymt PPD ID: 6066033492	160.05
07/05	Aetna Health Ins Ins Pymt PPD ID: 6066033492	143.32



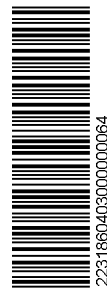
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## ELECTRONIC WITHDRAWALS (continued)

DATE	DESCRIPTION	PPD ID	AMOUNT
07/05	Sparrowhawk Sola Echeckpay	PPD ID: F472574800	53.03
07/06	Goldenrule Ins Prem	PPD ID: 1376028756	46.46
07/07	07/07 Online Payment 17783874331 To Allstate		360.00
Total Electronic Withdrawals			\$7,049.59

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 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 \$8,187.18. 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 \$252.59)
- **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 \$5,306.76)



## CHASE SAVINGS

CHRIS ERICKSON  
OR LIZ ERICKSON

Account Number: 000001197017229

## SAVINGS SUMMARY

	AMOUNT
Beginning Balance	\$3,934.25
Deposits and Additions	0.02
Electronic Withdrawals	-1,608.44
Ending Balance	\$2,325.83
Annual Percentage Yield Earned This Period	0.01%
Interest Paid This Period	\$0.02
Interest Paid Year-to-Date	\$0.19

## TRANSACTION DETAIL

DATE	DESCRIPTION	AMOUNT	BALANCE
	Beginning Balance		\$3,934.25
06/09	06/09 Online Transfer To Chk ...5263 Transaction#: 17582171817	-800.00	3,134.25
06/29	Northwestern Mu Isa Pymnt PPD ID: 9000596067	-808.44	2,325.81
07/07	Interest Payment	0.02	2,325.83
	Ending Balance		\$2,325.83

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 \$2,325)



June 07, 2023 through July 07, 2023  
Primary Account: **000000714245263**

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**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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June 07, 2023 through July 07, 2023  
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## Overdraft and Overdraft Fee Information for Your Chase Checking Account

### What You Need to Know About Overdrafts and Overdraft Fees

An overdraft occurs when you do not have enough money in your account to cover a transaction, but we pay it anyway. Whether your account has enough money to cover a transaction is determined during our nightly processing. During our nightly processing, we take your previous end of day's balance and post credits. If there are any deposits not yet available for use or holds (such as a garnishment), these will reduce the account balance used to pay your transactions. Then we subtract any debit transactions presented during our nightly processing. The available balance shown to you during the day may not be the same amount used to pay your transactions as some transactions may not be displayed to you before nightly processing.

We pay overdrafts at our discretion, which means we do not guarantee that we will always authorize or pay any transactions presented for payment. If we do not authorize an overdraft, your transaction will be declined. If we do not pay an overdraft, your transaction will be returned. Additional information about overdrafts and your account features can be found in the *Deposit Account Agreement*.

We can cover your overdrafts in three different ways:

1. We have a Standard Overdraft Practice that comes with your account.
2. We offer Overdraft Protection through a link to a Chase savings account, which may be less expensive than our Standard Overdraft Practice. You can contact us to learn more.
3. We also offer Chase Debit Card Coverage<sup>SM</sup>, which allows you to choose how we treat your everyday debit card transactions (e.g. groceries, gasoline or dining out), in addition to our Standard Overdraft Practice.

This notice explains our Standard Overdraft Practice and Chase Debit Card Coverage.

- **What is the Standard Overdraft Practice that comes with my account?**

We **do** authorize and pay overdrafts for the following types of transactions:

- Checks and other transactions made using your checking account number
- Recurring debit card transactions (e.g. movie subscriptions or gym memberships)

- **What is Chase Debit Card Coverage?**

If you enroll in Chase Debit Card Coverage we **may** authorize and pay overdrafts for **everyday debit card transactions** (e.g. groceries, gasoline or dining out) in addition to our Standard Overdraft Practice.

- **What fees will I be charged if Chase pays my overdraft?**

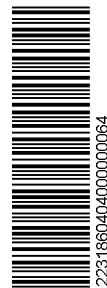
If we authorize and pay an overdraft, we'll charge you a \$34 Overdraft Fee (may also be referred to as Insufficient Funds Fee) per transaction during our nightly processing beginning with the first transaction that overdraws your account balance by more than \$50 (maximum of 3 fees per business day, up to \$102).

We won't charge you an Overdraft Fee in the following circumstances:

- With Chase Overdraft Assist<sup>SM</sup>, we won't charge an Overdraft Fee if you're overdrawn by \$50 or less at the end of the business day **OR** if you're overdrawn by more than \$50 and you bring your account balance to overdrawn by \$50 or less at the end of the next business day (you have until 11 p.m ET (8 p.m PT) to make a deposit or transfer). Chase Overdraft Assist does not require enrollment and comes with eligible Chase checking accounts.
- We won't charge an Overdraft Fee for transactions that are \$5 or less.
- We won't charge an Overdraft Fee if your debit card transaction was authorized when there was a sufficient available balance in your account.
- For Chase Sapphire<sup>SM</sup> Checking and Chase Private Client Checking<sup>SM</sup> accounts, there are no Overdraft Fees when item(s) are presented against an account with insufficient funds on the first four business days during the current and prior 12 statement periods. On a business day when we returned item(s), this counts toward the four business days when an Overdraft Fee will not be charged.

- **What if I want Chase to authorize and pay overdrafts on my everyday debit card transactions?**

If you or a joint account owner want Chase to authorize overdrafts on your everyday debit card transactions, please make your Chase Debit Card Coverage selection. You can change your Chase Debit Card Coverage selection at any time by signing in to chase.com or Chase Mobile<sup>®</sup> to update your account settings, calling us at 1-800-935-9935 (or at 1-713-262-1679 if outside the U.S.), or visiting a Chase branch. We accept operator relay calls.





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