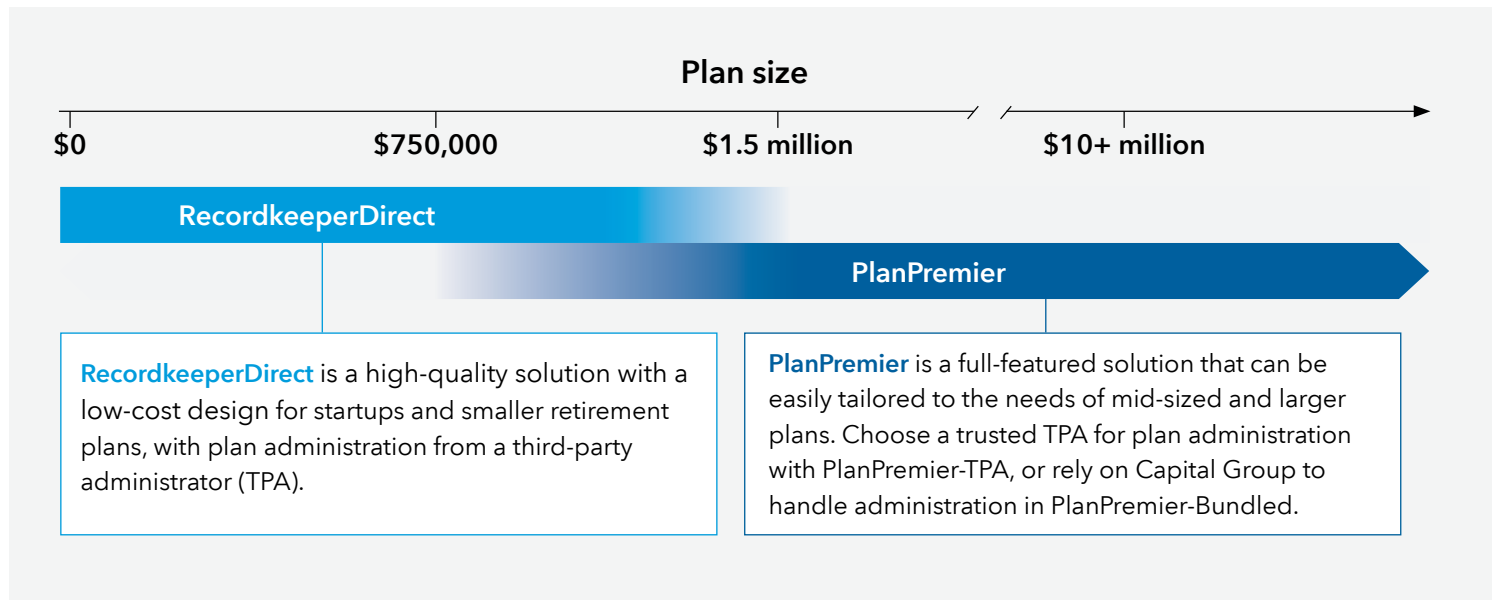




Find the solution that fits your plan

Capital Group, home of American Funds, offers a family of retirement plan solutions with features designed to serve the needs of a broad range of clients.



	RecordkeeperDirect	PlanPremier-TPA	PlanPremier-Bundled
Investments			
Cost-effective access to the American Funds Target Date Retirement Series®	✓	✓	✓
More than 40 American Funds investments	✓	✓	✓
Investment flexibility with options from dozens of other investment managers*		✓	✓
Self-directed brokerage account option (additional fees apply)		✓	✓
Pricing			
No conversion/takeover fees	✓	✓	✓
Fixed-dollar recordkeeping fee structure		✓	✓

*Availability of fund families may depend on the plan's share class.

Plan services

Customized plan and investment review reports	✓	✓	✓
Payroll integration	✓	✓	✓
Online invoicing and ACH payments	✓	✓	✓
Employee vesting tracking	✓	✓	✓
Deferral election tracking	✓	✓	✓
Corporate trustee services (additional fees may apply)	✓	✓	✓
Notice delivery service (additional fees may apply)	✓	✓	✓
Beneficiary tracking (additional fees may apply)	✓	✓	✓
Pre-approved plan document	Provided by TPA	Provided by TPA	✓
Compliance testing	Provided by TPA	Provided by TPA	✓
Form 5500 preparation	Provided by TPA	Provided by TPA	✓
Interactive analytics dashboard to monitor plan health		✓	✓
Automatic enrollment and escalation services		✓	✓
Eligibility tracking and notification		✓	✓

Participant services

Online enrollment	✓	✓	✓
Customized enrollment education website, emails and materials, including Spanish materials	✓	✓	✓
Mobile app	✓	✓	✓
Educational content and interactive planning tools	✓	✓	✓
Investment and fee disclosure	✓	✓	✓
Online distribution requests	✓	✓	✓
Online loan requests		✓	✓
Personalized income projections, peer comparisons, health care cost estimates and budgeting tools		✓	✓
Spanish website and statements		✓	✓
Distribution kits mailed to participants		✓	✓

Investors should carefully consider investment objectives, risks, charges and expenses. This and other important information is contained in the fund prospectuses and summary prospectuses, which can be obtained from a financial professional and should be read carefully before investing.

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