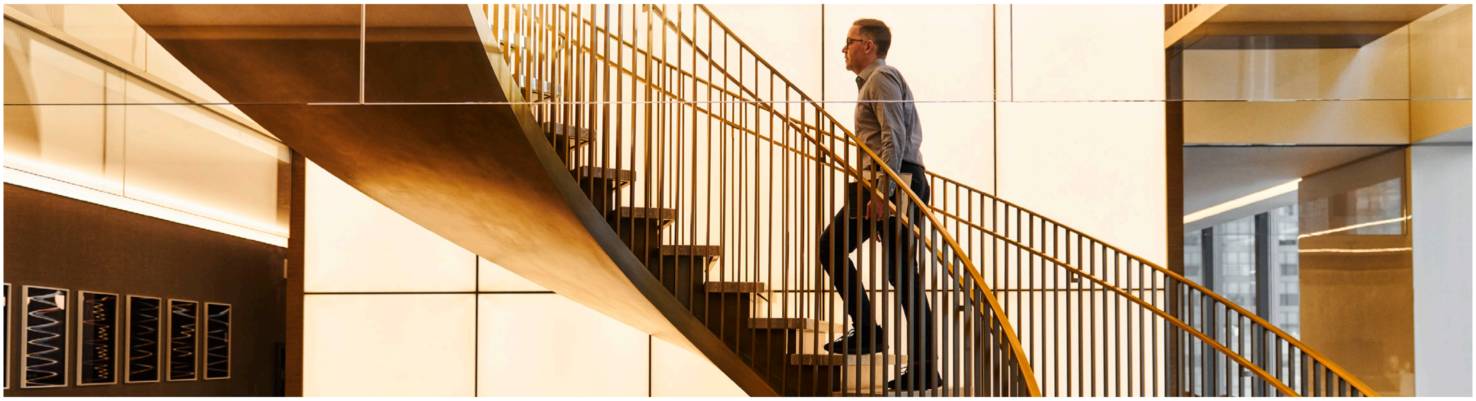
Retirement plan services
PlanPremier®-TPA

CAPITAL GROUP® | AMERICAN FUNDS®



Step up your practice with PlanPremier-TPA

PlanPremier-TPA is designed to provide you and your clients greater **service,** robust recordkeeping **features** and **fixed-dollar pricing.**

Why consider PlanPremier-TPA

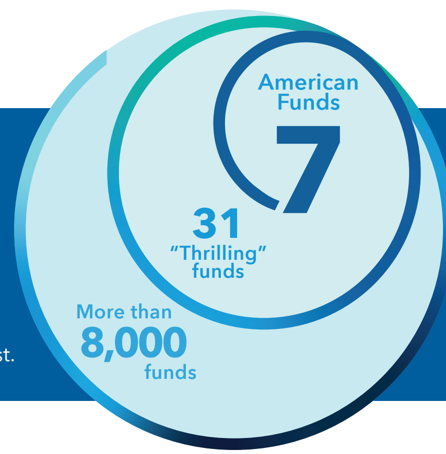
Flexible, multi-fund-family investment options

Build a better 401(k) with investments from many well-respected investment managers, including the American Funds Target Date Retirement Series®.*

Seven American Funds among Morningstar's "Thrilling 31"†

Out of more than 8,000 funds, only 31 were deemed "Thrilling" by Morningstar – and seven of those are American Funds. That's more **"thrills"** than any other target date series.

Passive funds are not managed to generate returns that exceed their benchmarks, so target date funds that have only passive underlying investments likely will not have funds on the Morningstar "Thrilling" list.



Award winning service and pricing

Financial Advisor IQ Service Awards 2022 — **Gold Medal Winner**: Overall recordkeeper excellence

Financial Advisor IQ Service Awards 2022 — **Gold Medal Winner**: Recordkeeper price

Financial Advisor IQ Service Awards 2022 — **Gold Medal Winner**: Recordkeeper client service

2022 Financial Advisor IQ Service Awards, September 2022. Methodology: Votes of 742 advisors were collected through an online poll conducted April to June, 2022. Among large managers, American Funds was awarded the gold medal for "Recordkeepers: Best Overall," "Recordkeepers: Best Price" and "Recordkeepers: Best Client Service." In total, Capital Group won 12 Advisor IQ Service Awards.

*Availability of fund families may depend on the plan's share class. There's no proprietary fund requirements when our target date series is used for conversion.

†Source: Morningstar, "The Thrilling 31: A List of Great Funds" by Russel Kinnel, October 2022. Morningstar's screening took into consideration expense ratios, manager ownership, returns over manager's tenure, and Morningstar Risk, Analyst and Parent ratings. The universe was limited to share classes accessible to individual investors with a minimum investment no greater than $50,000 and did not include funds of funds. Class A shares were evaluated for American Funds. American Funds Target Date Retirement Series invests in Class R-6 shares of the underlying American Funds. Not all "Thrilling" American Funds strategies are in each target date fund. Underlying funds may change over time. Visit morningstar.com for more details.

Fixed-dollar pricing

Our transparent, fixed-dollar approach to pricing is designed to help your clients save money – for all investment menu selections.

- Pricing is based on the **number of participants,** not plan assets
- Recordkeeping **costs don't go up** as plan assets grow
- Sponsors can **choose how to pay** the plan's costs

Pricing for PlanPremier-TPA

Participants with account balances	PlanPremier-TPA recordkeeping fees	
	Base fee	Per participant
1-25	$2,200	$100
26-300	2,200	60
301-500	3,700	55
501-1,000	6,200	50
1,001 or more	8,200	48

Interactive participant website and app

Boost participation and engagement with retirement income projections, peer comparisons, outside account integration and other valuable budgeting tools.

ICanRetire® is our exclusive participant engagement program that offers targeted emails, easy-to-understand action plans and more to help drive retirement plan success.

Trust an industry leader

Dedicated to investors

More than 2.6 million plan participants count on us to pursue their retirement goals.*

A trusted recordkeeper

Nearly 66,000 businesses and their employees rely on our retirement plan recordkeeping services.*

A top asset manager

With $2.2 trillion assets under management, we're one of the world's largest investment management organizations.*

*As of 12/31/22.

We're dedicated to helping you and your clients succeed

Visit **capitalgroup.com** to learn more about PlanPremier-TPA.
To get started helping more clients with this full-service solution, **call us at (800) 421-9900**.

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.