

# 457(b) New Participant Enrollment

✓ Information about the participant		
Important: This section must be completed before an a	account can be established. Please type or p	orint clearly.
SSN of participant Date	of birth of participant (mm/dd/yyyy)	Country of citizenship
F		
First name of participant (print)	MI Last	
Residence address (physical address required — no P.O. boxes)	City	State ZIP
Mailing address (if different from residence address)	City	State ZIP
mailing address (ii different from residence address)	City	/ \
Email address*		(
		Daytime priorie
Marital status: I am married. (See Section 5.)	I am not married.	
*Your privacy is important to us. For information on our privacy	policies, visit www.capitaigroup.com.	
Information about the employer		
<b>Z</b>		
Name of organization Plan ID		EIN
		( ) Ext.
Name of employer contact		Daytime phone
Address	City	State ZIP
3 Investment instructions		
For a quick guide to fund names, numbers, minimums a investments are available for this plan type.	and share class restrictions, go to www.cap	italgroup.com/fundguide. Only Class A share
Note: The minimum initial and subsequent investment is	·	, ,
selections identified below. To make changes to yo The percentage specified must equal the fund mir		locations in the future, notify your employer.
	•	
Fund name or number	Percentage	
	%	
	%	
	%	
	%	
	%	
Total cor	ntribution%	
Note: The \$10 setup fee will be deducted from your acco	ount	







## **Beneficiary designation**

We encourage you to consult a professional regarding the tax-law and estate planning implications of your beneficiary designation. All stated percentages must be whole percentages (e.g., 33%, not 33.3%). If the percentages do not add up to 100%, each beneficiary's share will be based proportionately on the stated percentages. When percentages are not indicated, the beneficiaries' shares will be divided equally.

- **Notes:** Your spouse may need to sign in Section 5. If you wish to name more than one trust or entity, customize your designation or need more space, attach a separate page. Include the name, address, relationship, date of birth or trust, SSN/TIN and percentage for each beneficiary.
  - If you name a trust as beneficiary, provide the full legal name of the trust. Example: "The Davis Family Trust."

1.	First name (print)	MI	Last name			Suffix
OR	Name of trust or other entity (print)					
	Address		City		State	ZIP
	Spouse* Child of owner Other person Trust Other entit	y Date of t	oirth or trust (mm/dd/yyyy)	SSN/TIN		Whole % only
2.	First name (print)	MI	Last name			Suffix
	Address		City		State	ZIP
	Spouse* Child of owner Other person Date of birth (mm	/dd/yyyy)	SSN			Whole % only
3.	First name (print)	MI	Last name			Suffix
	Address		City		State	ZIP
	Spouse* Child of owner Other person Date of birth (mm.	/dd/yyyy)	SSN			Whole % only
4.	First name (print)	MI	Last name			Suffix
	Address		City		State	ZIP
	Spouse* Child of owner Other person Date of birth (mm	/dd/vvvv)				Whole % only

<sup>\*</sup> By naming my spouse as a beneficiary, I elect to treat such spouse as a beneficiary while we are married. Effective immediately upon the divorce, annulment or other lawful dissolution of my marriage, the designation shall be null and void, unless after the dissolution of my marriage I affirmatively elect to name my former spouse as my non-spouse beneficiary.





# **Beneficiary designation**

(continued)

Important: Section 4-A must be completed prior to completing Section 4-B.

B. Contingent Beneficiary(ies): If no Primary Beneficiary survives me, pay my benefits to the following Contingent Beneficiary(ies). If any designated Contingent Beneficiary(ies) dies before I do, that beneficiary's share will be divided proportionately among the surviving Contingent Beneficiaries unless otherwise indicated. If no Contingent Beneficiaries survive me, assets will be paid according to the Custodial Agreement default designation. First name (print) ΜI Suffix Last name Name of trust or other entity (print) ZIP City Address State Trust Whole % only Child of owner Other person Other entity Date of birth or trust (mm/dd/yyyy) 2. First name (print) MI Last name Suffix State Address City ZIP Other person SSN Child of owner Date of birth (mm/dd/yyyy) Whole % only Spouse' First name (print) MI Suffix Last name ZIP Address City State Child of owner Other person Date of birth (mm/dd/yyyy) SSN Whole % only First name (print) МІ Last name Suffix City State ZIP Address Other person Date of birth (mm/dd/yyyy) SSN Whole % only Child of owner Spouse' First name (print) MI Last name Suffix City ZIP Address State Date of birth (mm/dd/yyyy) SSN Whole % only

Spouse\*

Child of owner

Other person

<sup>\*</sup> By naming my spouse as a beneficiary, I elect to treat such spouse as a beneficiary while we are married. Effective immediately upon the divorce, annulment or other lawful dissolution of my marriage, the designation shall be null and void, unless after the dissolution of my marriage I affirmatively elect to name my former spouse as my non-spouse beneficiary.

## Spousal consent

Consult your financial professional and/or employer about the need for spousal consent.

I am the spouse of the participant named in Section 1. I irrevocably consent to the designation made by my spouse to have any death benefits paid to the named beneficiary(ies) specified in Section 4. I understand that the effect of such designation is to cause my spouse's death benefit to be paid to a beneficiary other than me, that such beneficiary designation is not valid unless I consent to it and that my consent is irrevocable unless my spouse revokes the beneficiary designation.

Name of spouse of participant (print)	Signature of spouse of participant	Date	(mm/dd/yyyy)
lame of spouse of participant (print)	Signature of spouse of participant	Date	(mm/dd/yyyy)



By signing below, I acknowledge that I agree to the beneficiary designation default or I have designated the beneficiary(ies) in Section 4 or on the attached page. I understand that I and all shareholders at my address will receive one copy of fund documents (such as annual reports and proxy statements) unless I opt out by calling (800) 421-4225.

	X		1
Name of participant (print)	Signature of participant	Date	(mm/dd/yyyy)

This document may not be signed using Adobe Acrobat Reader's "fill and sign" feature.

Please mail or fax this form to the appropriate service center.

(If you live outside form to the Indiana Service Center.)



**Indiana Service Center** 

American Funds Service Company P.O. Box 6164 Indianapolis, IN 46206-6164

Overnight mail address 12711 N. Meridian St. Carmel, IN 46032-9181 Fax (888) 421-4371

Virginia Service Center

**American Funds Service Company** P.O. Box 2560 Norfolk, VA 23501-2560

Overnight mail address 5300 Robin Hood Rd. Norfolk, VA 23513-2430

Fax (888) 421-4371

If you have questions or require more information, contact your financial professional or call American Funds Service Company at (800) 421-4225.