

Availability of American Funds in DC recordkeeping platforms

September 2024



CAPITAL GROUP | **AMERICAN FUNDS**[®]

Plan recordkeeper	Available platform(s)	Target date retirement series	Other American Funds
ADP Retirement Services	Advisor Access	Yes	All
	Open Fund Access	Yes	All
	Strategic Plan Services (SPS)		
Ameritas	Advantage Elite	Yes	All
	Elite MEP		
	SoloPlus		
Aon Hewitt	Full Service (NAV)	Yes	All
Ascensus	Full Service (NAV)	Yes	All
	Level Compensation Sleeve		
	TPA Recordkeeping Only (NAV)		
Aspire Financial	Full Service	Yes	All
Charles Schwab	Schwab Retirement Business Services (unbundled; NAV)	Yes	All
	Schwab Retirement Plan Services (bundled; NAV)		
CUNA Mutual Retirement Solutions	ClearDirection Custom	Yes	All
	ClearDirection Portfolio (NAV)		
	ClearDirection Select (NAV)		
Empower Retirement	Traditional Open Architecture (NAV)	Yes	All
	Empower Select (NAV)		
Fidelity	Full Service-Direct (NAV)	Yes	All
	Fidelity Advisor		
John Hancock	TRS (NAV)	Yes	All
	Enterprise (NAV)		
	Signature: Core Market (GVA)	Yes	AMBAL, AMCAP, AMF, BFA, CIB, EUPAC, FI, GFA, GVT, ICA, IFA, NPF, NWF, RIC, RIM, RIE, SBF, SCWF, WBF, WGI, WMIF
July Business Services	Freedom Series (unbundled; NAV)	Yes	All
	Liberty Series (bundled; NAV)		
	SOLOK		
Lincoln Financial Group	Lincoln Alliance (NAV)	Yes	All
	Lincoln Director 2.0	Yes	AMBAL, AMCAP, CIB, EUPAC, GBAL, GFA, ICA, IGI, NPF, NWF, WGI, WMIF
MassMutual Financial Group	Reflex (NAV)	Yes	All
	Aviator (GVA)	Yes	AMCAP, CIB, EUPAC, FI, GFA, ICA, IFA, WGI, WMIF
Mercer	Mercer Trust (NAV)	Yes	All
Merrill Lynch	MLII	Yes	All
Nationwide Financial	Innovator Advantage (GVA)	No	AFRIS Conservative, AFRIS Enhanced, AFRIS Moderate, AHIT, AMBAL, AMCAP, AMF, CIB, EUPAC, FI, GFA, GVT, ICA, IFA, NEF, NPF, NWF, SCWF, WBF, WGI, WMIF
	Flexible Advantage (NAV)	Yes	All

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Investments are not FDIC-insured, nor are they deposits of or guaranteed by a bank or any other entity, so they may lose value.

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Plan recordkeeper	Available platform(s)	Target date retirement series	Other American Funds
Newport Group	Full Service	Yes	All
	Level Compensation Sleeve		
New York Life Investment Management	401(k) Complete (NAV)	Yes	All
OneAmerica	OneSolution (GVA)	Yes	AHIT, AMBAL, AMCAP, EUPAC, FI, GFA, IBFA, NPF, NWF, SCWF, WGI, WMIF
	OneAlliance (GVA)		
	Premier Trust	Yes	All
Paychex	Open Fund Select (NAV)	Yes	All
Plan Administrators Inc. (PAi)	Open Architecture	Yes	All
	CoPilot	No	AFMF, AMCAP, NWF
Principal Financial Group	Mutual Fund Network (NAV)	Yes	All
Prudential Financial	Total Retirement Solutions	Yes	All
Securian	AdvantagePlan	Yes	All
	SelectPlan		
The Standard	Group Annuity	Yes	All
	NAV		
Transamerica Retirement Solutions	Director Series (GVA)	Yes	AHIT, AMBAL, AMCAP, AMF, BFA, CIB, EUPAC, FI, GFA, ICA, IFA, NEF, NPF, NWF, SCWF, WBF, WGI, WMIF
	Partner Series (GVA)		
	Advisor Series (NAV)	Yes	All
	Institutional Markets Open Architecture (NAV)		
VOYA Retirement	Framework(k) (NAV)	Yes	All
	MAP Select (GVA)	Yes	AHIT, AMBAL, AMCAP, AMF, BFA, CIB, EUPAC, FI, GFA, ICA, IFA, IGI, NEF, NPF, NWF, SCWF, WBF, WGI, WMIF

American Funds abbreviations:

- AFMF** American Funds Mortgage Fund®
- AFRIS** American Funds Retirement Income Portfolio Series
- AHIT** American High-Income Trust®
- AMBAL** American Balanced Fund®
- AMCAP** AMCAP Fund®
- AMF** American Mutual Fund®
- BFA** The Bond Fund of America®
- CIB** Capital Income Builder®
- DWGI** American Funds Developing World Growth and Income Fund
- EUPAC** EuroPacific Growth Fund®
- FI** Fundamental Investors®
- GBAL** American Funds Global Balanced Fund
- GFA** The Growth Fund of America®
- GVT** U.S. Government Securities Fund®
- IBFA** Intermediate Bond Fund of America®
- ICA** The Investment Company of America®
- IFA** The Income Fund of America®
- IGI** International Growth and Income Fund
- ILBF** American Funds Inflation Linked Bond Fund®
- MMF** American Funds U.S. Government Money Market Fund
- NEF** The New Economy Fund®
- NPF** New Perspective Fund®
- NWF** New World Fund®
- RIC** American Funds Retirement Income Portfolio Series - Conservative
- RIM** American Funds Retirement Income Portfolio Series - Moderate
- RIE** American Funds Retirement Income Portfolio Series - Enhanced
- SBF** Strategic Bond Fund
- SCWF** SMALLCAP World Fund®
- STBF** Short-Term Bond Fund of America®
- WBF** Capital World Bond Fund®
- WGI** Capital World Growth and Income Fund®
- WMIF** Washington Mutual Investors Fund

For more information about the American Funds Target Date Retirement Series® and our retirement plan solutions, call (800) 421-9900 or visit capitalgroup.com/401k.

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