Instant insight
For retirement plan intermediaries

CAPITAL GROUP® | AMERICAN FUNDS®

Presentations to support retirement plan practices

These RP educational seminars from American Funds can be used to address challenges and help grow practices.

NEW RP presentations

CE CFP CIMA
Approved for public audience

Stop playing mind games

Help improve participant outcomes with behavioral insights

This presentation explores the mental and behavioral biases likely at the root of poor financial decisions, turning investors into their own worst enemies. It explores how "money mind games" can trigger various behaviors and showcases the crucial role of financial professionals.

Approved for public audience

Fiduciary fundamentals

Demystifying your obligation to retirement plan participants

This presentation aims to demystify the role of a fiduciary to retirement plans. It highlights the importance of acting in the exclusive interest of plan participants, having an up-to-date investment policy statement, offering a rational number of well-balanced investment options and seeking help when needed.

Business building

CE CFP CIMA
Approved for financial professionals only

Acquiring modern retirees

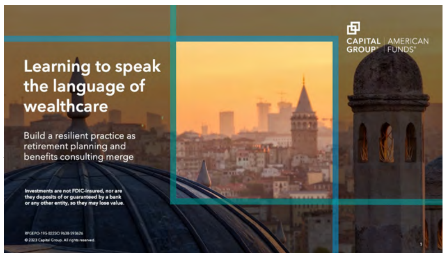
Strategies for growing your practice

Modern retirees' investment decisions have deviated from past norms, necessitating a fresh mindset and approach. This presentation provides exercises to aid financial professionals in understanding their clients' mindsets, emphasizing frequent conversations to align their retirement plans with their goals.

Approved for public audience

Pursue growth and stability with retirement plans

Retirement plans can be a valuable source of revenue. This presentation underscores the benefits of incorporating retirement plans into your practice and provides a practical guide on how to do so. See how current trends and research can be harnessed as a blueprint for the future.



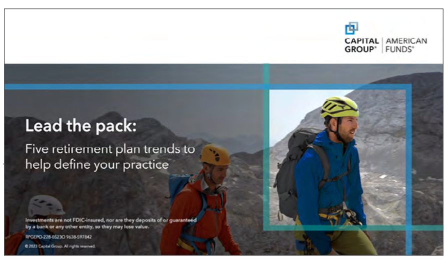
CE CFP CIMA
Approved for public audience

Learning to speak the language of wealthcare

Build a resilient practice as retirement planning & benefits consulting merge

This presentation shows how financial professionals can expand their practice by learning the language of health benefits and forming partnerships with health benefits providers.

RP practice management

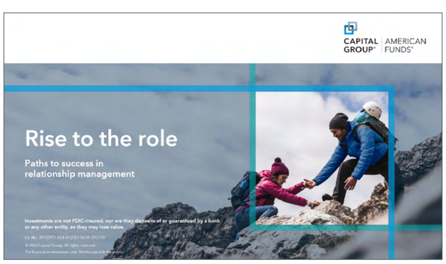


CE CFP CIMA
Approved for public audience

Lead the pack

Five retirement trends to help define your practice

Several trends are shaping the future of the retirement plan business that financial professionals may want to apply to help expand their practice. In this presentation, learn strategies to help build a practice by leveraging the legislative tailwinds to expand retirement coverage and incorporating new features and plans into a larger retirement benefits package. See how ongoing retirement plan litigation may create an opportunity to add value to your role.

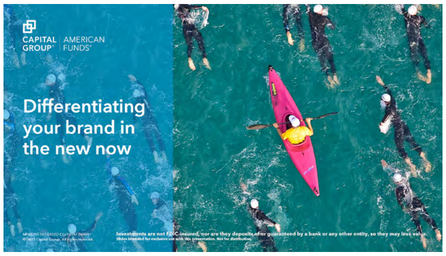


Approved for financial professionals only

Rise to the role

Paths to success in relationship management

Relationship managers do more than service plans, they must handle the nuances of many different types of relationships: with employers, employees, investment committees, financial professionals, consultants and more. This presentation helps relationship managers develop the framing, listening and closing skills to become more effective at the job.

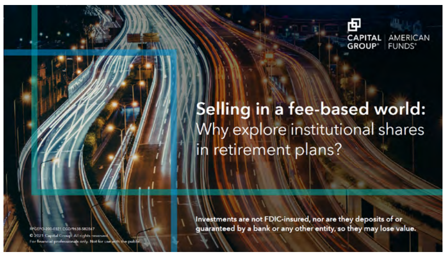


Approved for public audience

Differentiating your brand

In the new now

In a crowded marketplace, how can you stand out? With a differentiated brand. Today's successful retirement plan practices spend time building their unique brand. This presentation walks participants through their current practice with an eye toward identifying unique advantages to highlight and promote.



CE CFP CIMA

Approved for financial professionals only

Selling in a fee-based world

Why explore institutional shares in retirement plans?

What is the fee-based revolution in selling retirement plans? Find out how institutional shares can help your practice thrive by providing plan sponsors more flexibility and making fees more transparent.

Other RP presentations

Approved for public audience

Health meets wealth

How health savings accounts can enhance retirement security

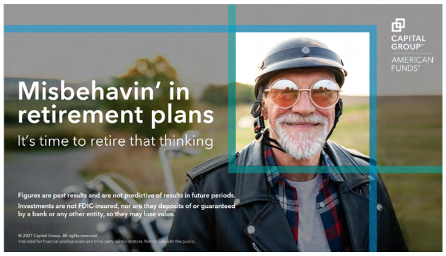
This presentation discusses how health savings accounts (HSAs) are not just a way of paying for health care expenses, but an added retirement savings benefit that can be offered by employers for their employees.

CE CFP CIMA

Approved for public audience

Key considerations for selecting the right recordkeeper

What are the things that matter most to plan sponsors when it comes to recordkeeping? This presentation will break down needs across three key areas: investments, services and fees. By focusing on what's most important, participants will see how conventional thinking can transform into a more client-supportive approach.

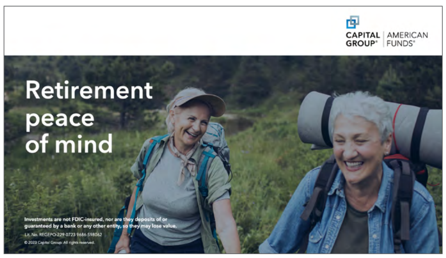


CE CFP CIMA
Approved for public audience

Misbehavin' in retirement plans

It's time to retire that thinking

When bad behaviors happen to good participants, it is usually because of timing, uncertainty or attention biases that cloud sound decision-making. We will share practical strategies in plan design and participant education from the world of behavioral finance to help offset the natural tendencies that can lead to bad outcomes.



Approved for financial professionals only

Retirement peace of mind

The value of protected income

Financial well-being in retirement is often expressed in terms of numbers – sources of income, investment returns, the amount one needs to save. But a recent Capital Group survey revealed the desire for something often regarded as intangible when it comes to retirement security: the importance of peace of mind. What gives investors peace of mind in retirement? In this presentation, financial professionals will learn what factors beyond portfolio results contribute to a happy retirement, including how protected income can serve an important role in helping investors feel successful.

Contact your Capital Group representative.

Scan this for Capital Group's insights and resources to support retirement plan practices.

On or around July 1, 2024, American Funds Distributors, Inc. will be renamed Capital Client Group, Inc.

Lit. No. RPGEFL-325-0524O CGD/9638-S99531