

3 steps to powerful target date fund evaluation

Our easy-to-use online tool is based on DOL guidance

Target Date ProView helps address the challenges intermediaries face when helping clients review and select target date funds for their defined contribution (DC) plans.

This web-based tool:

- Is based on Department of Labor (DOL) guidelines
- Creates a client-ready report in just a few clicks
- Uses objective data from Morningstar, Inc.
- Compares funds using both traditional and deeper, more powerful metrics
- Compares mutual funds and collective investment trusts (CITs)

The Target Date ProView experience



Select funds.

Choose up to four target date series from all series tracked by Morningstar.



Research funds. Dive into...

- Glide paths
- Risks
- Returns
- Expenses
- Underlying funds
- Managers & fund profiles

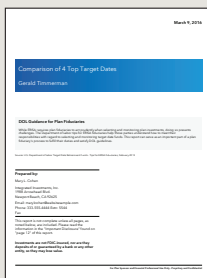


Create report.

Create a personalized, client-ready, DOL-based document comparing the funds.

Moving fast?

Click **"Create Report"** to download a client-ready document comparing up to four funds.

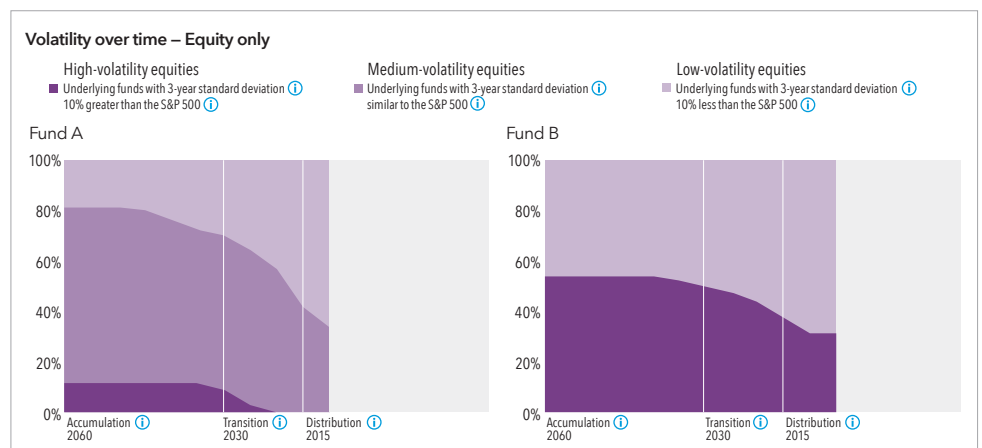


Take a deeper dive into research

Glide path

Traditional view: Compare glide paths to evaluate differences in the funds' mix of equities and fixed income.

Dive deeper: Analyze whether and how the composition of equity and fixed-income allocations changes over time to suit participants' evolving needs.



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

Risk

Traditional view: Compare standard deviations and Sharpe ratios across the funds' glide paths.

Dive deeper: Use ProView to check each series' upside and downside capture ratios.

Returns

Traditional view: Compare Morningstar rankings for each fund vintage.

Dive deeper: Check how much risk each fund series has taken to achieve its returns.

Expenses

Traditional view: Compare fund expense ratios.

Dive deeper: Consider one common element of value by comparing a fund's expenses with returns.

Underlying funds

View key metrics of the series' underlying funds, including:

- Average age of the funds
- Average manager tenure
- Manager ownership
- Morningstar ratings

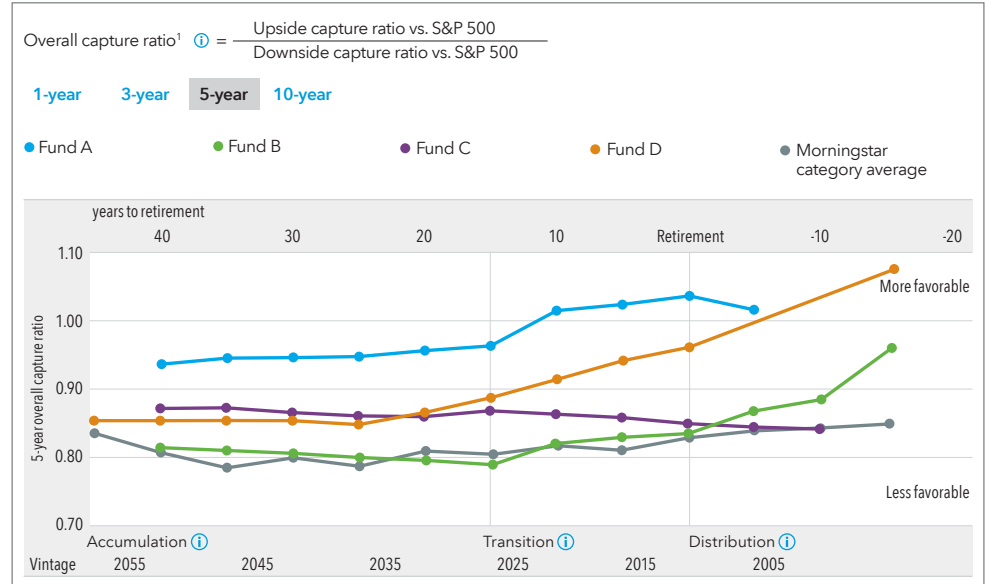
Manager & fund profile

Examine manager and fund characteristics. View the fund's Morningstar analyst report with one click.

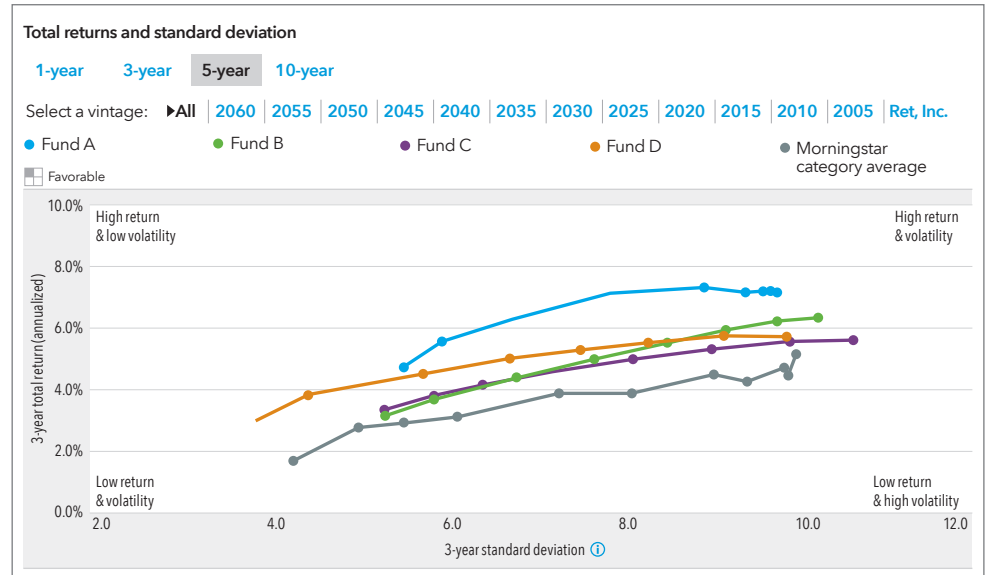
Personalized report

Enter details about your firm and your client to create a personalized, client-ready document based on the DOL's "Tips for ERISA Plan Fiduciaries."

The deeper view of risk: Capture ratios



The deeper view of returns: Returns and volatility



For illustrative purposes only.

Enhance your practice with Target Date ProView

Target Date ProView's fast, powerful target date fund evaluation can help you:

- Turn retirement plan prospects into clients
- Efficiently review clients' target date funds for due diligence purposes
- Seize new business opportunities as they emerge

Visit capitalgroup.com/proview to take a deeper dive into evaluation today.

Although target date portfolios are managed for investors on a projected retirement date time frame, the allocation strategy does not guarantee that investors' retirement goals will be met.

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