



DO NOT use this supplement for retirement accounts for which Capital Bank and Trust Company (CB&T) serves as Custodian or Trustee.

# 1 Information about the account owner

\_\_\_\_\_    -   -      
 First name MI Last SSN of IRA owner (provide the last four digits)

# 2 Account registration

Choose only one of the following:

IRA     Roth IRA     SEP IRA     SIMPLE IRA     Other \_\_\_\_\_

Indicate whether the account should be established using the Trustee/Custodian's EIN or the participant's SSN.  EIN **OR**  SSN

**Note:** American Funds Service Company is **NOT** responsible for tax reporting.

# 3 Trustee or Custodian information

*The Trustee or Custodian is establishing the account for the individual named in Section 1. The Trustee or the Custodian must sign in Section 8 of the F-2 Share Account Application for Financial Professionals.*

The entity listed below will be serving as:  Trustee **OR**  Custodian

\_\_\_\_\_   -        
 Name of entity EIN

\_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_  
 \_\_\_\_\_ ( ) \_\_\_\_\_ Ext. \_\_\_\_\_ ( ) \_\_\_\_\_  
 Person authorized to act on behalf of Trustee or Custodian Daytime phone Fax

## 4 Participant investment instructions

For a quick guide to fund names, numbers, minimums and share class restrictions, go to [www.capitalgroup.com/fundguide](http://www.capitalgroup.com/fundguide).

- A.  Invest 100% of my contributions in the American Funds Target Date Retirement Series® fund with the year closest to my 65th birthday.

**Target Date Fund 2070** (designed for those born 2003 or later)

**Target Date Fund 2065** (designed for those born 1998–2002)

**Target Date Fund 2060** (designed for those born 1993–1997)

**Target Date Fund 2055** (designed for those born 1988–1992)

**Target Date Fund 2050** (designed for those born 1983–1987)

**Target Date Fund 2045** (designed for those born 1978–1982)

**Target Date Fund 2040** (designed for those born 1973–1977)

**Target Date Fund 2035** (designed for those born 1968–1972)

**Target Date Fund 2030** (designed for those born 1963–1967)

**Target Date Fund 2025** (designed for those born 1958–1962)

**Target Date Fund 2020** (designed for those born 1953–1957)

**Target Date Fund 2015** (designed for those born 1948–1952)

**Target Date Fund 2010** (designed for those born 1947 or earlier)

OR

- B.  Invest my contribution as instructed below. (You may customize your investment strategy by selecting a combination of funds.)

Fund name or number	Percentage (whole percentages only)
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
<b>Total</b>	<b>===== %</b>