



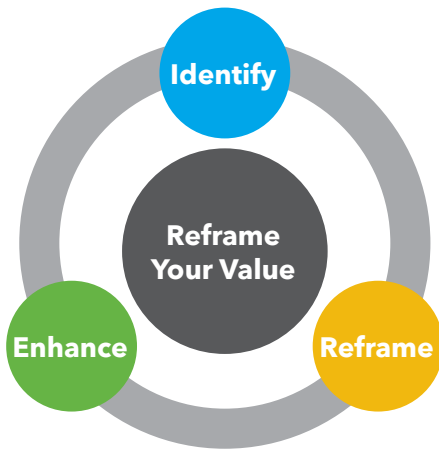
AMERICAN
FUNDS®

From Capital Group

Presentation

Thriving in the New Normal:
Reframe Your Value Around
Client Goals

The Rules Have Changed. Your Goals Have Not.



With new regulations and changing distribution models, the financial services industry continues to evolve. This is the New Normal. But one thing remains constant: your ability to help plan sponsors achieve success with their plans.

Thriving in the New Normal: Reframe Your Value Around Client Goals brings us back to a client-focused conversation centered on the needs of plan sponsors. Using a goals-based approach, we identify the most critical objectives of plan sponsors and how advisors can demonstrate their value by helping clients to achieve them.

Advisors can position their practice for success by focusing on three primary areas:

- **Identify Plan Goals**

Plan sponsors may not know what services they want or need from advisors, but they all have certain goals for their plan. By understanding those goals, advisors can reframe their approach to explain more effectively what they do and why clients should choose them as their plan's advisor.

- **Reframe Your Value as a Trusted Plan Advisor**

Advisors should ask themselves, "How am I aligning my conversations and activities to reinforce my value?" The goal is to articulate all that they can do for current clients and prospects. This can make it clear to both sponsors and their employees that advisors play a critical role in their success.

- **Enhance Efficiency in Your Practice**

Advisors should take a strategic look at their practice to assess how they are spending their time and resources. In so doing, they can make adjustments to their practice so it can run more efficiently.

In an increasingly complex world, it's important for advisors to leverage what they're already doing right. By reframing their value around client goals, they'll be better able to take advantage of opportunities that arise in the New Normal.

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

Investors should carefully consider investment objectives, risks, charges and expenses. This and other important information is contained in the fund prospectuses and summary prospectuses, which can be obtained from a financial professional and should be read carefully before investing.

Lit. No. RPEGFL-345-0417P Printed in USA CGD/AFD/9386-S58815 © 2017 American Funds Distributors, Inc.