

Take your growing retirement plans' features and services to the next level

As their retirement plans grow, plan sponsors may benefit from additional recordkeeping services, more investment choices and personalized tools and resources. **PremierPassport** provides a convenient way to upgrade your RecordkeeperDirect® clients to a more robust retirement plan platform – and could result in lower plan costs as well.

Don't let your best clients become someone else's best prospects.

Benefits of PremierPassport

Moving from RecordkeeperDirect to our PlanPremier®-TPA platform with PremierPassport offers numerous advantages:

- **Same trusted provider** – Your clients will remain with Capital Group, home of American Funds, the same plan provider they've grown to value and trust.
- **Greater investment flexibility** – Sponsors have access to an expansive choice of hundreds of mutual funds from dozens of investment managers, including Capital Group.
- **Dedicated support** – An Implementation Coordinator will guide you, the plan sponsor and TPA through the entire transition process. You'll also have access to helpful online resources, including a conversion timeline, website demos and forms.
- **Minimal paperwork and fewer administrative tasks for you and your clients** – We're able to use the RecordkeeperDirect plan information we already have on file to establish plans on the PlanPremier-TPA platform.
- **No blackout notification required*** – Optional weekend conversion processing can minimize disruption to participants.

* Applies to plans that have opted for the streamlined conversion process. For more information about the streamlined conversion process, including certain limitations, please call us at (800) 421-9900.

For financial professionals, third-party administrators and institutional consultants only.

PremierPassport can help reinforce your value to clients and build their trust and loyalty.

Advantages of PlanPremier-TPA

More robust technology – Time-saving features make managing a plan easier:

- **Paperless enrollment online or by phone**, with automatic enrollment and deferral increase options.^{1,2}
- **Employee eligibility tracking**, including automatic delivery of enrollment materials directly to employees.^{1,2}
- **Payroll Bridge**, which allows two-way file sharing between Capital Group and payroll providers such as ADP and Ceridian.¹

Online management of loans and distributions, including an electronic “to-do” list and automatic mailing of distribution kits.

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Personalized tools and resources add greater value to the plan:

- **An interactive participant website** that includes a monthly retirement income projection, future health care cost estimates and peer comparisons.
- **Distribution kits** are mailed to participants automatically.
- **Competitive plan pricing** – Our straightforward pricing structure reflects both quality and value:
 - **No conversion costs** – There are no upfront expenses with PremierPassport.
 - **Plan credits**, if applicable, are generated from plan assets and help offset recordkeeping costs and other plan expenses.

Plan credits can reduce recordkeeping costs as assets grow

PlanPremier-TPA, Class R-3 shares, 50 participants	When assets decrease	Current plan assets	When assets increase		
			\$2,000,000	\$2,500,000	\$3,000,000
Total plan assets	\$1,000,000	\$1,500,000	\$2,000,000	\$2,500,000	\$3,000,000
Gross annual recordkeeping fee	\$5,200	\$5,200	\$5,200	\$5,200	\$5,200
Annual plan credit	(\$2,500)	(\$3,750)	(\$5,000)	(\$6,250)	(\$7,500)
Net annual recordkeeping fee	\$2,700	\$1,450	\$200	(\$1,050)	(\$2,300)

This example is hypothetical and used for illustrative purposes only. Net plan credits can be allocated back into participant accounts or, depending on plan terms, used to offset other plan expenses.

Maintain and build your business with PremierPassport.

Take advantage of PremierPassport to show your clients that you're actively pursuing their best interests as their retirement plan needs evolve.

Please call us at **(800) 421-9900** if you'd like to order a proposal.

¹ For plans that have opted for the streamlined conversion process, this feature may be added after a plan converts to PlanPremier-TPA.

² Availability depends on information provided in the payroll file.

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.

Capital Client Group, Inc.

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