

We've made  
enrollment easy

With flexible enrollment options and a range of resources, **we've made the enrollment process easy** for plan sponsors and participants alike. Whether you're starting a new plan or converting an existing one, it's the same simple process.

# The enrollment process in three easy steps

STEP

## 1 ..... Welcome

Introduce employees to their retirement plan with a welcome email or letter.

This is a good time to share important plan information, including the fee disclosure and a blackout notice for conversion plans.

We make this step easy for you by providing the necessary documents and a sample email or letter.

STEP

## 2 ..... Get ready

Use our customized enrollment resources to help employees learn about the benefits of their retirement plan and make informed investment decisions.

### Educational website

Your plan includes a customized website that gives employees a resource to learn about their plan, get detailed investment information and access interactive retirement-planning tools.

The educational website can also be used to help lead an enrollment meeting.





## Enrollment is ongoing – and easy

When you provide us with an employee’s email address and plan entry date, we’ll send them an invite when they’re eligible to enroll.

### STEP

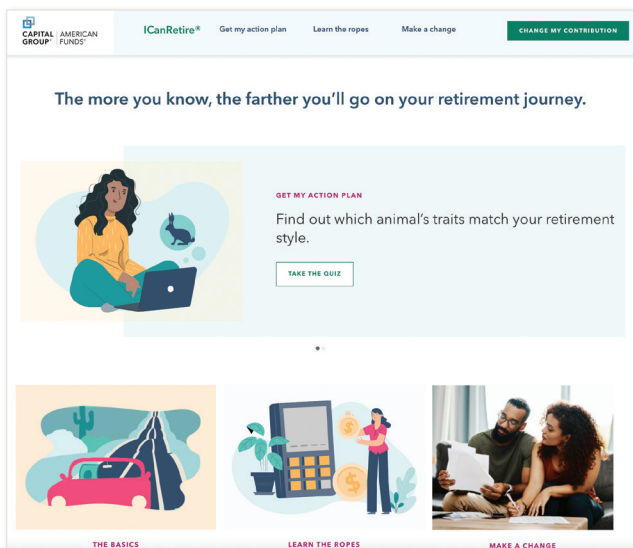
## 3 ..... Enroll

By providing us with basic information about your employees, you can take advantage of our convenient online enrollment experience.

When employees enroll using our website or mobile app, you don’t have to collect enrollment forms or input their investment elections. Employees can also benefit from a faster enrollment, so they can start saving sooner.

## ICanRetire®

Our digital participant engagement program is designed to help participants take control of their financial future and add value for plan sponsors. From targeted emails to quizzes and comic strips, participants have never learned about retirement like this before.



## Here’s how it works:

### 1 Sam becomes eligible

Sam was hired after the plan’s initial enrollment but he’s now eligible to participate based on his **plan entry date**.

### 2 Sam learns about the plan

Sam receives **an email from us** that highlights the benefits of his retirement plan and includes a link to his plan’s **customized enrollment education website**.

### 3 Sam enrolls in the plan

Feeling confident, Sam **completes his enrollment online**. He can now track his retirement savings progress and even create an action plan with **ICanRetire**, our participant engagement program.

## You’ve got help along the way

Your plan’s financial professional is available to assist you at every step of the enrollment process – and beyond.

## Beyond enrollment: The tools for success

Once enrolled, participants can take advantage of our online retirement planning tools and resources to make the most of their plan.

	PlanPremier®	RecordkeeperDirect®
Access <b>educational content</b> to help optimize your savings plan.	✓	✓
Use our <b>interactive planning tools</b> to help you consider potential changes in your savings plan.	✓	✓
<b>Rebalance your asset mix</b> so your portfolio stays aligned with your investment goals.	✓	✓
<b>View your balance</b> and track your retirement savings progress.	✓	✓
See your <b>projected retirement income</b> based on your current savings.	✓	
Learn <b>how your savings stacks up</b> to your peers.	✓	
See how <b>estimated health care costs</b> could impact your retirement income.	✓	

### Better outcomes begin with a better enrollment process

Help provide the best participant experience and get more time to focus on your business with our:

- Flexible enrollment options
- Easy enrollment process
- Savings tools and resources

**To learn more, speak with your plan's financial professional or your retirement plan contact.**

### Financial professionals

Visit [capitalgroup.com/enrollment](https://capitalgroup.com/enrollment) to get everything you need to plan and present an enrollment meeting.

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