

Educational website guide

Use this guide to lead an enrollment meeting using your client's educational website.

[GET STARTED →](#)



📖 Educational website guide

💡 Each plan's educational website is customized to reflect the key benefits and other plan-specific information.

1 Instill confidence

Introduce Capital Group, home of American Funds, and discuss why we're a key provider for their retirement plan.

2 Inspire saving

Saving for retirement may not always seem easy but the reality is that you need to start planning now. Help inspire employees to get started by taking small steps toward their goals.

3 Highlight the plan benefits

Help employees understand the value of their retirement plan by highlighting key features. These can include a company match, tax benefits and more.

4 Explain how to enroll

Enrollment is an easy three-step process – and it's even easier for plans with **Quick enroll** or **Auto enroll** features. Give an overview of the process and then show employees where to enroll online or download enrollment forms.

The screenshot shows a retirement plan website for Capital Group American Funds. At the top right, there are links for 'Your plan contact', 'About Capital Group', and 'ENROLL'. A navigation bar includes 'Explore your plan', 'View investment results', 'Read FAQs', 'After you're enrolled', and 'Still not sure?'. The main content area is titled 'Explore your plan' and features a section 'Why investing in your plan is a good choice' with five columns of text. Below this is a 'How to enroll in your plan' section with three numbered steps: 1. Choose, 2. Enroll, and 3. Done!. At the bottom, there are three boxes for 'Your plan options': 'GET MAXIMUM FLEXIBILITY Individual funds', 'KEEP IT SIMPLE Target date funds', and 'MAKE IT EASY Quick enroll option'. The footer contains 'Investment results' information. Numbered callouts 1-4 are overlaid on the page to highlight key sections.

1 Small steps can take you far
Your employer offers a retirement savings plan to help you pursue your retirement goals. Use this site to get the information you need in order to feel good about enrolling in your plan.

3

4



5 Answer key investment questions

Walk employees through their plan options pages to help them learn about their investment options and determine how much they should save for retirement.

For plans that offer **Quick enroll** or **Auto enroll**, review their designated contribution rate and investment selection as well as any employer match or automatic contribution increase features.

6 Show the value of long-term results

Show employees where they can find detailed investment information. This can be a good opportunity to emphasize the importance of investing for the long term.

7 Answer common questions

Employees can quickly find answers to the most common enrollment questions with these plan-specific FAQs. You may want to address some of these questions during the presentation.

8 Lay out the next steps

Enrollment is just the first step. From tracking savings to managing emotions, we provide tools and resources that can help employees along their journey to retirement.

How to enroll in your plan

1 Choose
Decide how much you want to contribute and choose your funds.
Need help getting started? Your plan offers a quick enroll option.

2 Enroll
Enroll online or complete the enclosed forms and return them to your employer.

3 Done!
You can also:
• Designate your beneficiaries
• Consolidate or roll over another retirement plan into your new plan

How much will I contribute? **6%**
The amount that will be deducted from your pay.

How much will my employer match? **3%**
To help you save more, your employer match is a percentage of what you contribute, up to 3% of your pay. The maximum match is \$K per year.

What fund will I be invested in? **Target date fund**
Your plan's default investment is an age-based target date retirement fund.

5 Your plan options

- GET MAXIMUM FLEXIBILITY Individual funds**
Create a personalized investment mix that's tailored to your specific investment goals and preferences.
[LEARN MORE](#)
- KEEP IT SIMPLE Target date funds**
Get a diverse portfolio in a single fund based on a target retirement year. The investment mix automatically adjusts over time.
[LEARN MORE](#)
- MAKE IT EASY Quick enroll option**
The Quick enroll option makes it easy to start saving with a contribution rate and investment that's been selected by your employer.
[LEARN MORE](#)

6 Investment results
One way to assess an investment's results is to compare its results with those of a comparable benchmark or index. Check your investment's annual and semi-annual reports to shareholders for more information.
[LEARN MORE](#)

7 Frequently asked questions
From the enrollment process and beyond, we're here to answer your questions as you continue down the path of creating a comfortable retirement.

- What type of retirement plan do I have?**
Your employer's plan is a defined contribution plan that includes the following:
401(k)
A 401(k) lets you invest a portion of your paycheck before or after paying taxes.
[READ MORE](#)
- How much can I contribute?**
You decide how much of your salary you want to contribute, up to \$20,000 in 2024. If you're age 50 or older, you can contribute up to an additional \$3,000.
[See all FAQs >](#)

8 After you're enrolled
Retirement may be the most significant investment challenge that you'll face. Once you're enrolled, you can log in to your plan's website to track your progress, estimate income, make changes, and more.

- Explore your plan's website**

Log in to your plan's website to access all the features that can help you make the most of your account.
[READ](#)
- Estimate your retirement income**

After you're enrolled in your company's plan, our estimated retirement income tool can give you an idea of what your monthly income may be in retirement.
[READ](#)
- Feeling emotional about your investments?**

It's normal to feel worried when you see your investment value go down. But remember that market declines are a natural part of investing.
[READ](#)

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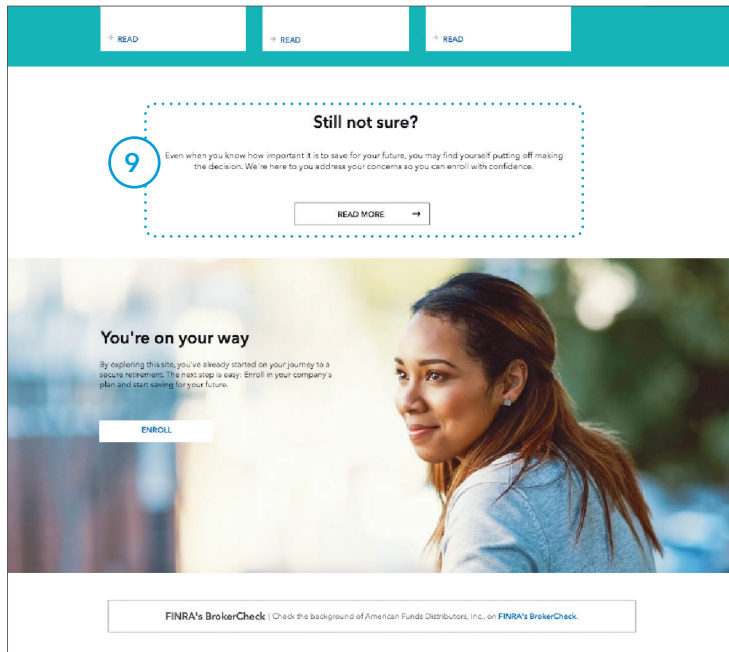
9 Address concerns

From “I probably can’t afford it” to “I might need my money in an emergency,” these articles address common enrollment roadblocks and help employees get started or stay on course toward their retirement goals.

10 Offer support

Show employees who to contact when they have questions about their plan or need tips for preparing for a meeting with their plan’s financial professional.

🖥️ Visit capitalgroup.com/enrollment for key resources to help you through each step of the enrollment process.



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