



# Show plan sponsors what a better value looks like



Set yourself apart with **Retirement Planalyzer** by showing sponsors how you might help them:

- **Save** money
- **Build** a stronger fund lineup
- **Trust** a proven leader

Call us at **(800) 421-9900, ext. 2**, or visit [capitalgroup.com/pl analyzer](https://capitalgroup.com/pl analyzer)

## Retirement Planalyzer can help you:



### Find & price

Get a clear visual of plan cost and its components as well as payment options



### Analyze & compare

Find potential savings by comparing services and costs to competitors and benchmarks



### Create lineup

Start with a highly regarded target date series then build a diversified fund menu



### Present & propose

Get a customized client illustration and/or proposal to close the deal

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.

This material is intended for financial professionals and third-party administrators. Use of this single sheet is subject to approval by your home office.

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

# How to use Retirement Planalyzer to help win and retain more plans

## What financial professionals have to say about Retirement Planalyzer:

- “It’s all of the things that I would talk to a plan sponsor about...what they should think about when they’re looking at the cost of a plan.”
- “I like being able to do this on my own very, very quickly. ... This is big.”
- “This is exactly what I’m looking for... a process I can have confidence in, a story I can tell and something I can easily manage.”

## Lean on us

In a 2020 survey,\* **American Funds** was the plan provider most often selected by established DC advisors for the following attributes:

- Is a company I trust
- Is reliable
- Inspires confidence

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## Here’s how you might start a conversation with a takeover prospect:

“My firm can provide you with a complimentary, no-obligation benchmark report on your retirement plan fees – similar to the generic report I just emailed you, but customized for your plan.

“To run the report, we don’t have to meet, and personal information isn’t required. I only need some plan-level data that should be easy to get, such as plan assets, costs, the investment lineup and number of participants.

“Once I get this information, I can send you a customized report within a few days, and I can look for opportunities for cost savings and other improvements.

“Who in your company can provide me with the plan data I need?”

Benchmarking plans for existing clients may be even easier because you probably already know how to find their plan data.

## Fee disclosure document titles

Some of the required data can often be found in a plan’s fee disclosure. Depending on the plan provider, these documents can help get you started:

### Capital Group | American Funds

Participant Fee Disclosure document and the recordkeeping services agreement

**ADP**  
Compensation and Fee Disclosure Document

**Ascensus**  
Disclosure of Services and Fees

**Empower Retirement**  
Plan Fee Disclosure for Plan Fiduciaries

**Fidelity**  
Statement of Services and Compensation

**John Hancock**  
Plan Review

**Lincoln**  
Retirement Plan Account Summary

**MassMutual**  
Plan Service Review

**Mutual of Omaha**  
Executive Summary of Fees

**Nationwide**  
Fee Disclosure 404(a)(5) Statement

**OneAmerica**  
Annual Plan Review Book

**Paychex**  
Retirement Plan Fee Disclosure (plus a recent monthly invoice)

**Principal**  
Retirement Plan Fee Summary

**Transamerica**  
Fee Disclosure Document

**Voya Financial**  
Summary of Investment Expenses and Indirect Compensation

\* Source: Escalent, Cogent Syndicated, “Retirement Plan Advisor Trends,” September 2022. Methodology: 538 respondents participated in a web survey conducted August 19-30, 2022. The respondents consisted of financial advisors managing defined contribution plans. For “Ownership” of Core Brand Attributes – Tier 1, among 385 “established” DC advisors (with at least \$10 million in DC plan assets under management), American Funds was selected most often in response to the question, “Which – if any – of these DC plan providers are described by this statement ... ‘Is reliable?’” American Funds was also selected most often for “Is a company I trust” (Core Brand Attributes – Tier 2) and “Inspires confidence” (Core Brand Attributes – Tier 3). Capital Group has provided input on some questions to be included in Cogent surveys over time.

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