

Retirement plan services

Retirement Planalyzer®



CAPITAL
GROUP®

AMERICAN
FUNDS®

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/planalyzer

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 2023 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
- Best-in-class plan sponsor, participant and plan advisor service and support
- Easy for advisors to do business with

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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

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™, October 2023. Methodology: 503 respondents participated in a web survey conducted September 8 to September 14, 2023. The respondents consisted of financial advisors managing defined contribution (DC) plans. For “Ownership” of Core Brand Attributes – Tier 1, among 383 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 ... ‘Easy for advisors to do business with?’” Additional Core Brand Attributes – Tier 1, that American Funds was noted for: “Is a company I trust,” “Is reliable,” “Inspires confidence.” American Funds was also selected most often for “Best-in-class plan sponsor service and support” and “Best-in-class plan advisor service and support” (Core Brand Attributes – Tier 2). Capital Group has provided input on some of the questions to be included in Cogent surveys over time. Additionally, Capital Group made a subscription investment to Cogent Syndicated to access a detailed version of the Retirement Plan Advisor Trends report.

Although target date portfolios are managed for investors on a projected retirement date time frame, the allocation strategy does not guarantee that investors’ retirement goals will be met.

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