

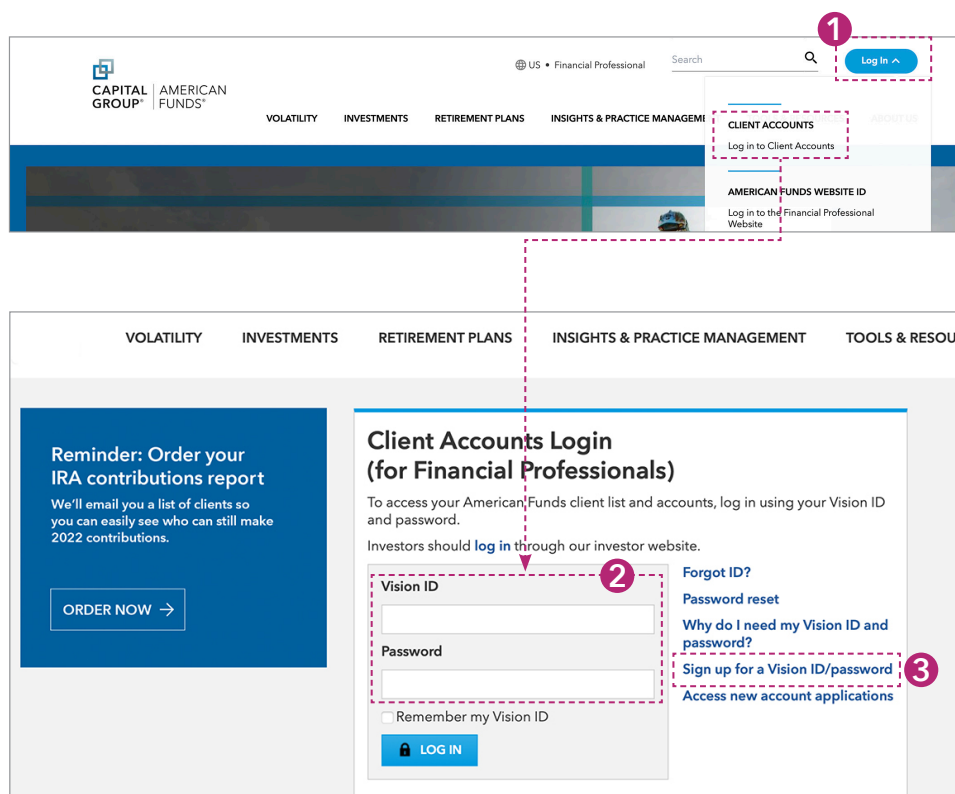
Tools to help you manage your book of business

Client Accounts

- ✓ View your total assets, client account balances and recent activity
- ✓ Review your personalized Message Center for reminders and updates
- ✓ Process transactions and complete account maintenance for your clients

Accessing Client Accounts

- 1 Go to **Log In** and then click **Log in to Client Accounts**
- 2 Enter your Vision ID and password to log in
- 3 If you don't have a Vision ID, click **Sign up for a Vision ID/password** and you'll receive your credentials from Vision in 1 to 3 days



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

Financial professionals should always contact their back office to determine if there are any restrictions on the use of American Funds products, tools, services, websites and literature.

4 Assets & Client List

View your total assets and list of American Funds clients

5 Client Search

Look up your clients' accounts by name, account number or BIN

6 Personalized Message Center

View reminders and client account updates

7 Transactions

Process client transactions online:

- Buy shares
- Sell shares
- Exchange shares
- Rebalance the account

4 Assets & Client List

Total Assets at American Funds
\$12,278,872.88

Top Clients

Client	Total Assets
MILLER FAMILY TRUST	\$2,104,055.67
WONDELL, FRAN	\$1,522,865.62
KENT, SHELBY	\$1,428,782.19
GONZALO, DAVID	\$979,659.29
MCMERGE ELEVEN	\$595,064.21
BEN MEZO, IFAN	\$546,045.29
RESTORE THE ETERNALS TRUST FUND	\$455,542.57
REX, BRACUS	\$432,298.14
GREGORY, CARSON	\$411,120.60
ETERNAL, FANE T	\$226,458.98

[View Full Client List](#)

5 Client Search Gregory Carson

6 Message Center Dismissed Messages (0)*

Advisor Reminders (1)

Order your RMD report now to ensure your clients meet the December 31 deadline [Dismiss](#)

Don't risk a 50% tax penalty for your clients. Order your RMD report today to review which of your clients need to take a distribution this RMD season.

[Learn more](#)

Yesterday
04/27/2020

Client Account Updates (2)

ALERT [Dismiss](#)

SHELBY KENT's systematic withdrawal plan for American Funds U.S. Government Money Market Fund - A may soon deplete the account balance.

Account: 123456789
03/06/2020

BRACUS REX's assets were received from HOMETOWN BROKERAGE. (Note: Account may not yet reflect the transfer of assets.) [Dismiss](#)

Account: 987654321
04/20/2020

[Top Financial Transactions](#)

To learn more about Client Accounts, watch video tutorials and more, visit capitalgroup.com/overview or scan the QR code with your phone's camera.



Portfolio | Portfolio Value History | Statements & Tax Forms | Profile & Settings

An easy way to stay informed

Sign up for customized email notifications to receive alerts for transactions, maintenance and other account activity.

CARSON GREGORY **\$411,120.60**
Total Portfolio Value as of 04/30/2020

19381646 CARSON GREGORY Account Value
\$126,432.59
as of 04/30/2020

[VIEW TRANSACTIONS](#)

7 Buy Sell Exchange Rebalance More Options Account Forms & Guidelines

Class A Shares	NAV	Shares	Current Value
American Funds U.S. Government Money Market Fund (AFAXX) → View pending transaction(s)	Fund Transactions \$1.00	22,554.66	\$22,554.66
Capital Income Builder (CAIBX) → View pending transaction(s)	Fund Transactions \$55.93	1,202.42	\$67,251.35
U.S. Government Securities Fund (AMUSX) → View pending transaction(s)	Fund Transactions \$14.90	2,458.16	\$36,626.58

[VIEW RETURNS](#) Total Account Value **\$126,432.59**

About These Investments

Recent Portfolio Transactions
Historical Balance
Rights of Accumulation (ROA)
Capital Gains/Dividends FAQ

Profile

CARSON GREGORY
3500 WISEMAN BLVD
SAN ANTONIO TX 78251-4320
[Update](#)

Automatic Transactions
[View](#)

Beneficiary Information
[View](#)

Bank Information

For Online Investing
Set Up | [Update](#)

Tax Information

Cost Basis Method
[Update](#)

Account Resource Center

- ✓ Find information to help you set up and manage client accounts
- ✓ Access forms, reports and procedures
- ✓ Get important reminders, service tips and answers to common client questions

Accessing and using the Account Resource Center

- 1 Access the **Account Resource Center** under **Tools & Resources**
- 2 Find forms and how-to information by account type
- 3 Order IRA Reports, explore Client Accounts and review policies and procedures
- 4 Review popular topics, including timely reminders, service tips and FAQs

You can also easily access the Account Resource Center at capitalgroup.com/resources, or scan the QR code with your phone's camera.



The screenshot shows the Account Resource Center website interface. At the top, there is a navigation menu with 'INVESTMENTS', 'RETIREMENT PLANS', 'INSIGHTS & PRACTICE MANAGEMENT', 'TOOLS & RESOURCES' (highlighted with a red dashed box and callout 1), and 'ABOUT US'. Below the navigation, there are two main sections: 'CLIENT ACCOUNT SUPPORT' and 'INVESTMENT TOOLS'. Under 'CLIENT ACCOUNT SUPPORT', there is a link for 'Account Resource Center' (highlighted with a red dashed box and callout 2) and 'Forms & Literature'. Under 'INVESTMENT TOOLS', there is a link for 'Portfolio Analyzer' and 'Run a Hypothetical'. Below this, there is a section titled 'Find forms and how-to information by account type:' (callout 2) with four tabs: 'Education/Custodial', 'Individual Retirement', 'Employer-sponsored', and 'Non-retirement'. Under the 'Education/Custodial' tab, there is a card for 'Education and custodial accounts' with a description and a list of account types: 'CollegeAmerica 529', 'Employer-sponsored CollegeAmerica 529', 'UGMA/UTMA accounts', 'Coverdell ESA', and 'ABLEAmerica'. Below this, there is a blue banner with three main sections: 'IRA Reports' (callout 3) with a description and an 'ORDER' button, 'Client Accounts Overview' with a description and a 'LEARN' button, and 'General Account Management' with a description and a 'REVIEW' button. At the bottom, there is a section titled 'Popular topics' (callout 4) with the text 'Get important reminders, service tips and answers to common client questions.' and three cards: 'Explore some of our most popular online tools and see how they can save you time.', 'Visit your new IRA Contributions Guide for guidelines, how-to information, reports and more.', and 'Visit your new Tax Center and easily find the information you need during tax season.'

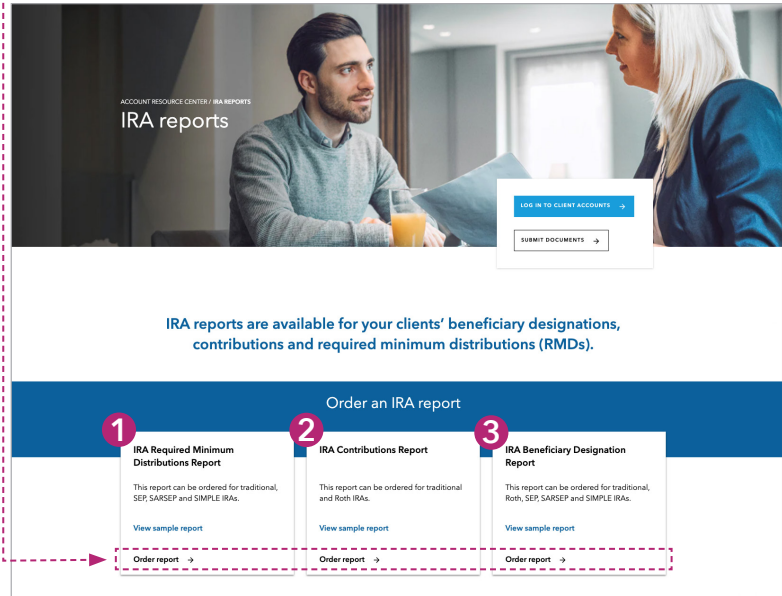
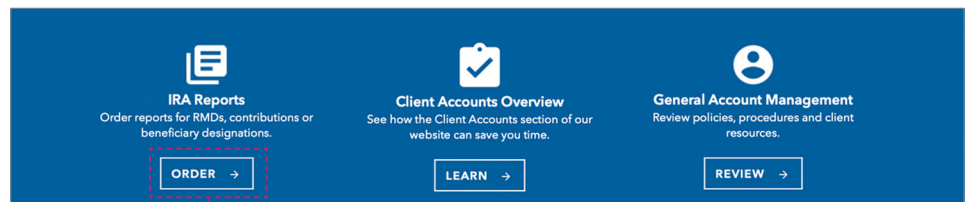
Ordering IRA reports

- ✓ Get reports for required minimum distributions (RMDs), beneficiary designations and contributions
- ✓ Plan ahead for client RMDs and IRA contributions
- ✓ Access information for your IRA clients in one place

From the Account Resource Center, go to **IRA Reports** and order:

- 1 RMD reports
- 2 Contributions reports
- 3 Beneficiary designation reports

You can also order your IRA Reports at: capitalgroup.com/IRAreports.

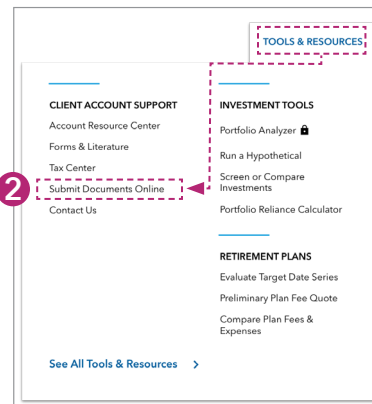
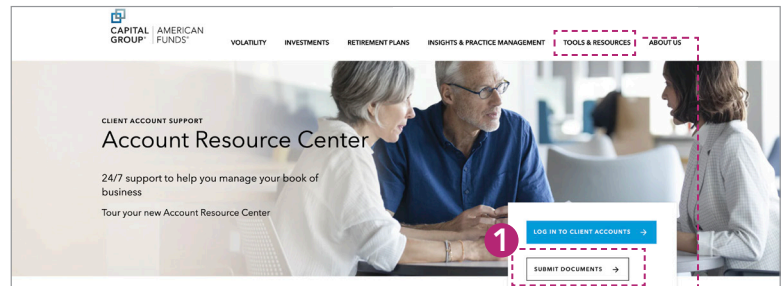


Submit Documents Online

- ✓ Easily and securely submit forms and applications online
- ✓ Submit any document you would normally fax
- ✓ Access the online submission tool from multiple places on our website

Locate the tool these three ways:

- 1 Click the **Submit Documents** button from any page in the **Account Resource Center**
- 2 Access **Submit Documents Online** under **Tools & Resources**
- 3 Go to capitalgroup.com/submitdocuments



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