Guide for managing your
clients' accounts online

CAPITAL GROUP® | AMERICAN FUNDS®

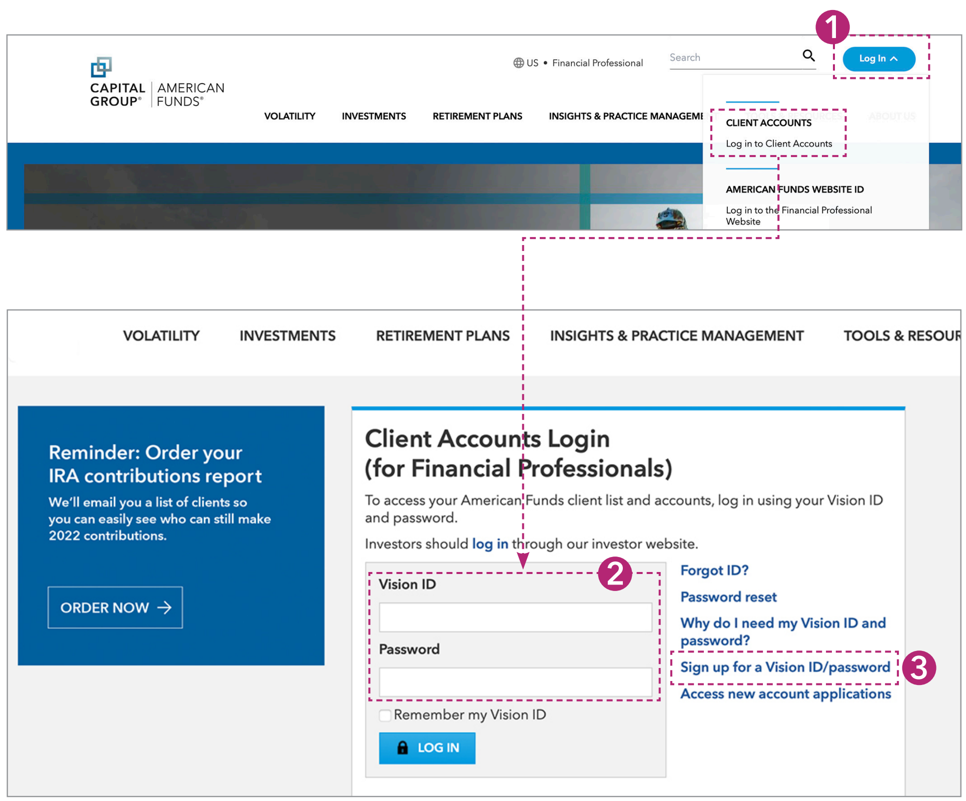
Tools to help you manage your book of business

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

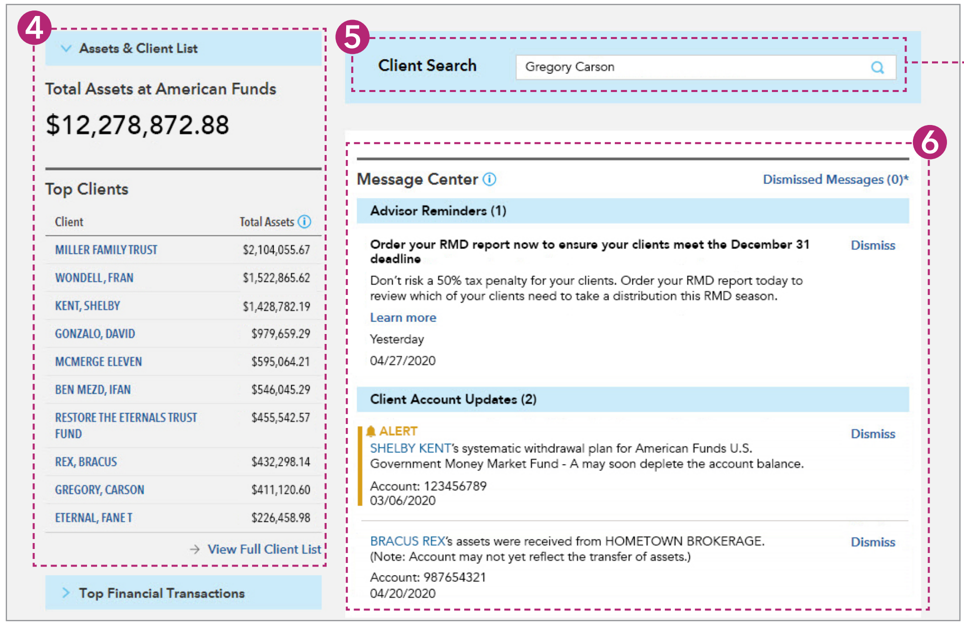
View reminders and client account updates

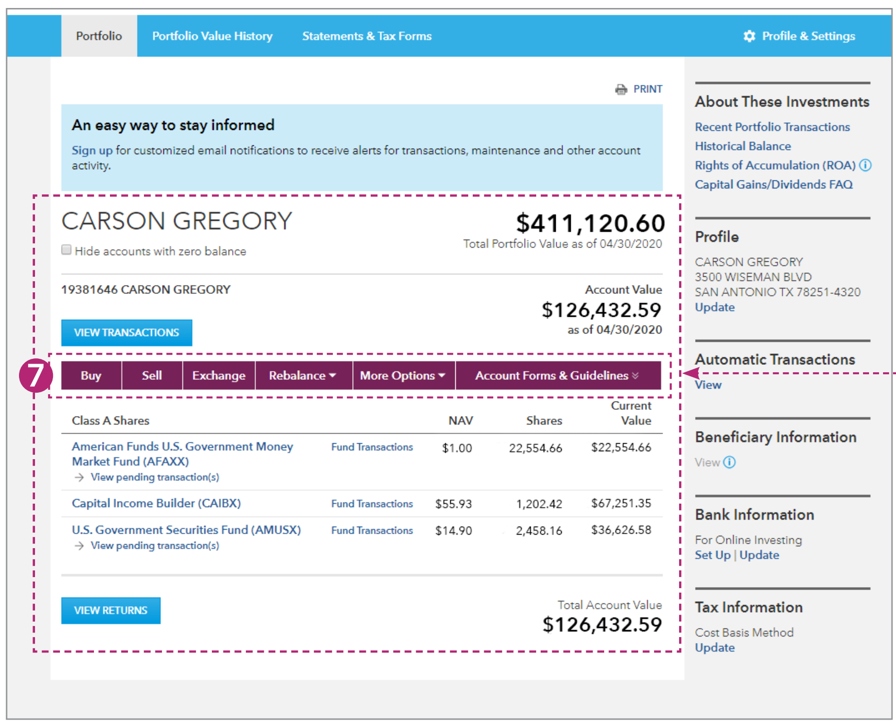
7 Transactions

Process client transactions online:

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

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.





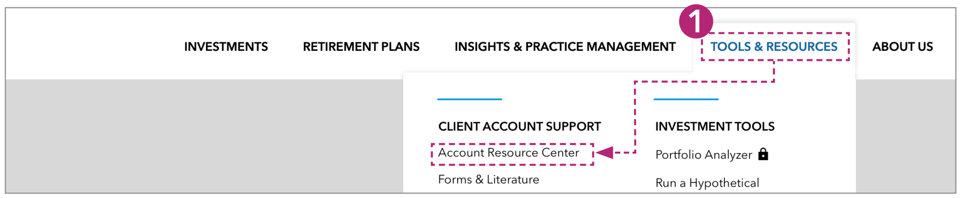
Account Resource Center

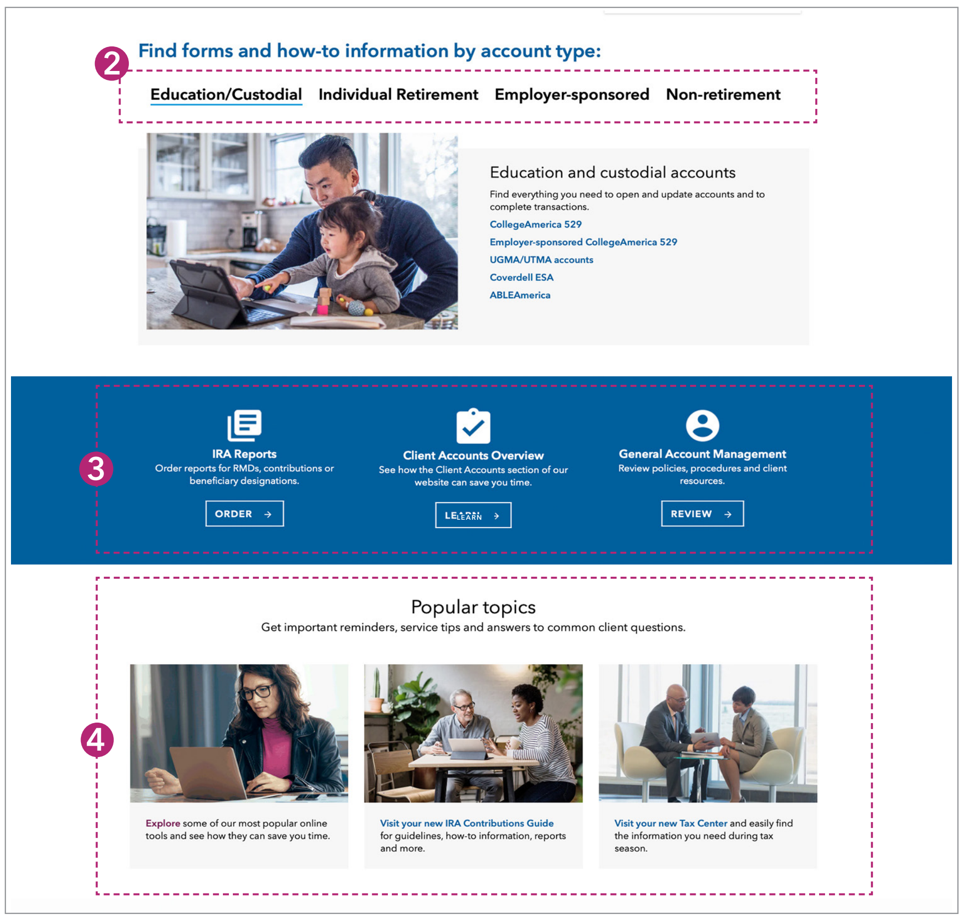
- Find information to help you set up and manage client accounts
- Access forms, reports and procedures
- Get important reminders, service tips and answers to common client questions

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.





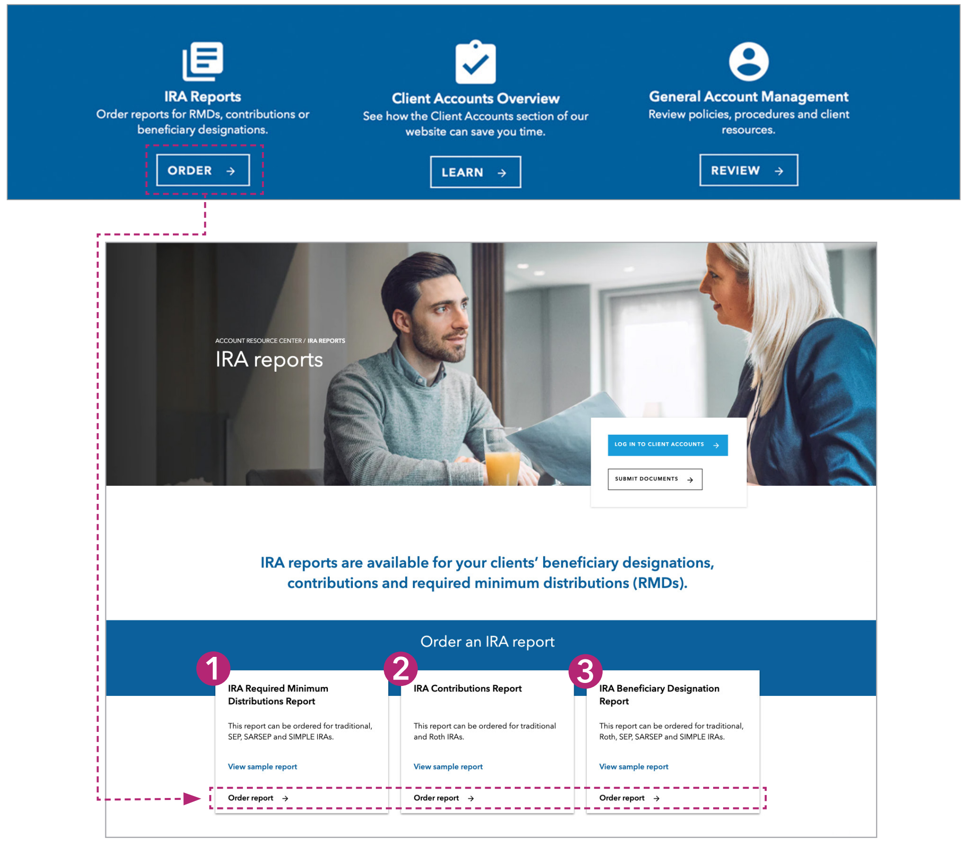
Ordering IRA reports

- 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**