

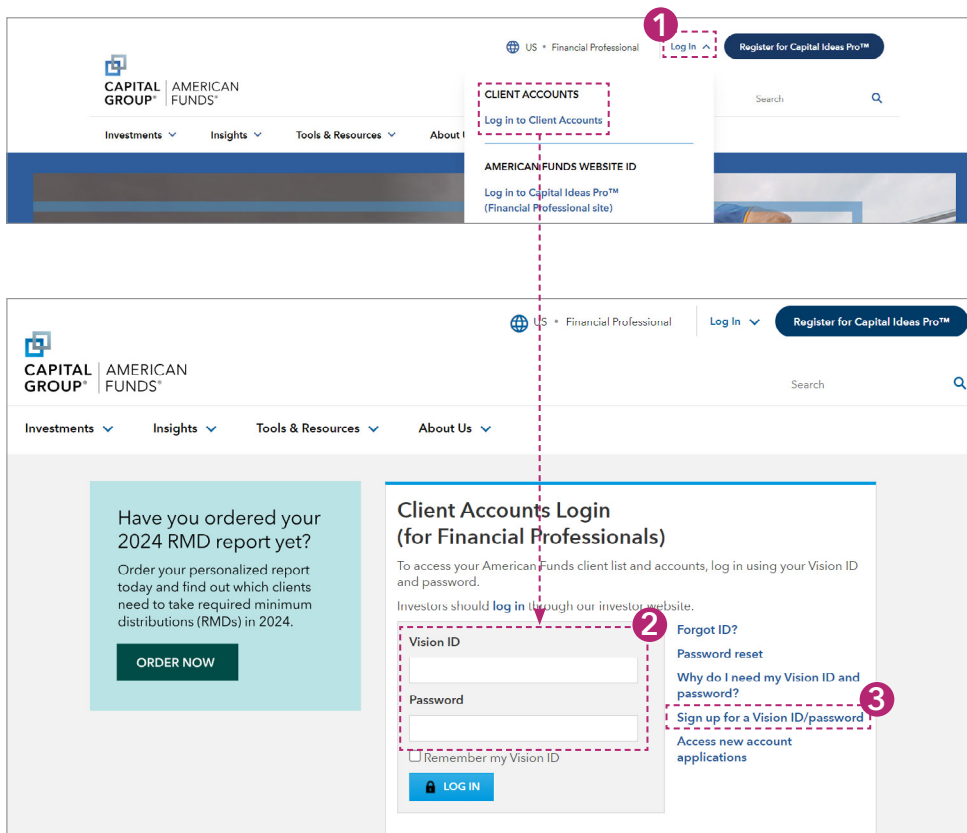
How Client Accounts can help you manage your book of business

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



For financial professionals only. Not for use with the public.

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

Using Client Accounts

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

If you'd like to also receive these reminders and updates via email, sign up at capitalgroup.com/notifications.

The screenshot shows the 'Assets & Client List' section with a total assets value of \$12,278,872.88 and a list of top clients. The 'Message Center' section displays advisor reminders and client account updates, including an alert for Shelby Kent's systematic withdrawal plan.

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 MEZD, 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

Transacting in Client Accounts

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.



The screenshot shows the 'Transactions' section for Gregory Carson's account. It displays the total portfolio value of \$411,120.60 and the account value of \$126,432.59 as of 04/30/2020. A table lists recent transactions for Class A Shares, including American Funds U.S. Government Money Market Fund (AFAXX), Capital Income Builder (CAIBX), and U.S. Government Securities Fund (AMUSX).

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

To learn more about the tools on our website, watch videos and download other guides, visit capitalgroup.com/advisortools or scan the QR code with your phone's camera.



Transactions and tasks you can complete in Client Accounts

View account information



- Beneficiary information (retail and Capital Bank and Trust Company (CB&T) IRA accounts only)
- Client address
- Cost basis method/tax lot information for covered shares (retail accounts only)
- Current and historical balances
- Pending and past transactions
- Personal rate of return
- Quarterly statements
- Rights of accumulation
- Statement of intention
- Successor owner information (529 accounts only)
- Tax forms

Manage automatic options



Add, modify or remove:

- Automatic exchange plans
- Automatic investment plans
- Automatic rebalance plans
- Automatic withdrawal plans (retail accounts only)

Complete financial transactions



Withdrawals via check or ACH:

- 529s (can also send assets directly to the college)
- IRAs
- Retail accounts

Exchanges

- From a retail account to a CB&T IRA to make an IRA contribution
- Within the same account

Investments

Rebalances

Conduct account maintenance



- Add or update bank information for investments
- Change cost basis method for covered shares (retail accounts only)
- Modify dividend/capital gain options (retail accounts only)
- Reorder money market checks
- Update client address

You can also access your American Funds accounts on DST Vision®. The two websites offer different options to help you manage accounts. For information on which tasks and transactions you can complete in Client Accounts versus DST Vision, go to capitalgroup.com/accounts.

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