



Find the solution that fits your plan

Capital Group, home of American Funds, offers retirement plan solutions with features designed to serve the needs of a broad range of clients.



	RecordkeeperDirect	PlanPremier-TPA	PlanPremier-Bundled
 Investments			
Cost-effective access to the American Funds Target Date Retirement Series®	Yes	Yes	Yes
More than 40 American Funds investments	Yes	Yes	Yes
Investment flexibility with options from dozens of other investment managers*	No	Yes	Yes
Self-directed brokerage account option (additional fees apply)	No	Yes	Yes
 Pricing			
No conversion/takeover fees	Yes	Yes	Yes
Fixed-dollar recordkeeping fee structure	No	Yes	Yes

*Availability of fund families may depend on the plan's share class.



Plan services

Customized plan and investment review reports	Yes	Yes	Yes
Payroll integration	Yes	Yes	Yes
Online invoicing and ACH payments	Yes	Yes	Yes
Employee vesting tracking	Yes	Yes	Yes
Deferral election tracking	Yes	Yes	Yes
Corporate trustee services (additional fees may apply)	Yes	Yes	Yes
Notice delivery service (additional fees may apply)	Yes	Yes	Yes
Beneficiary tracking (additional fees may apply)	Yes	Yes	Yes
Pre-approved plan document	Provided by TPA	Provided by TPA	Yes
Compliance testing	Provided by TPA	Provided by TPA	Yes
Form 5500 preparation	Provided by TPA	Provided by TPA	Yes
Interactive analytics dashboard to monitor plan health	No	Yes	Yes
Automatic enrollment and escalation services	Yes	Yes	Yes
Eligibility tracking and notification	Yes	Yes	Yes



Participant services

Online enrollment	Yes	Yes	Yes
Customized enrollment education website, emails and materials, including Spanish materials	Yes	Yes	Yes
Mobile app	Yes	Yes	Yes
Educational content and interactive planning tools	Yes	Yes	Yes
Investment and fee disclosure	Yes	Yes	Yes
Online distribution requests	Yes	Yes	Yes
Online loan requests	Yes	Yes	Yes
Personalized income projections, peer comparisons, health care cost estimates and budgeting tools	No	Yes	Yes
Spanish website and statements	No	Yes	Yes
Distribution kits mailed to participants	No	Yes	Yes

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.

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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