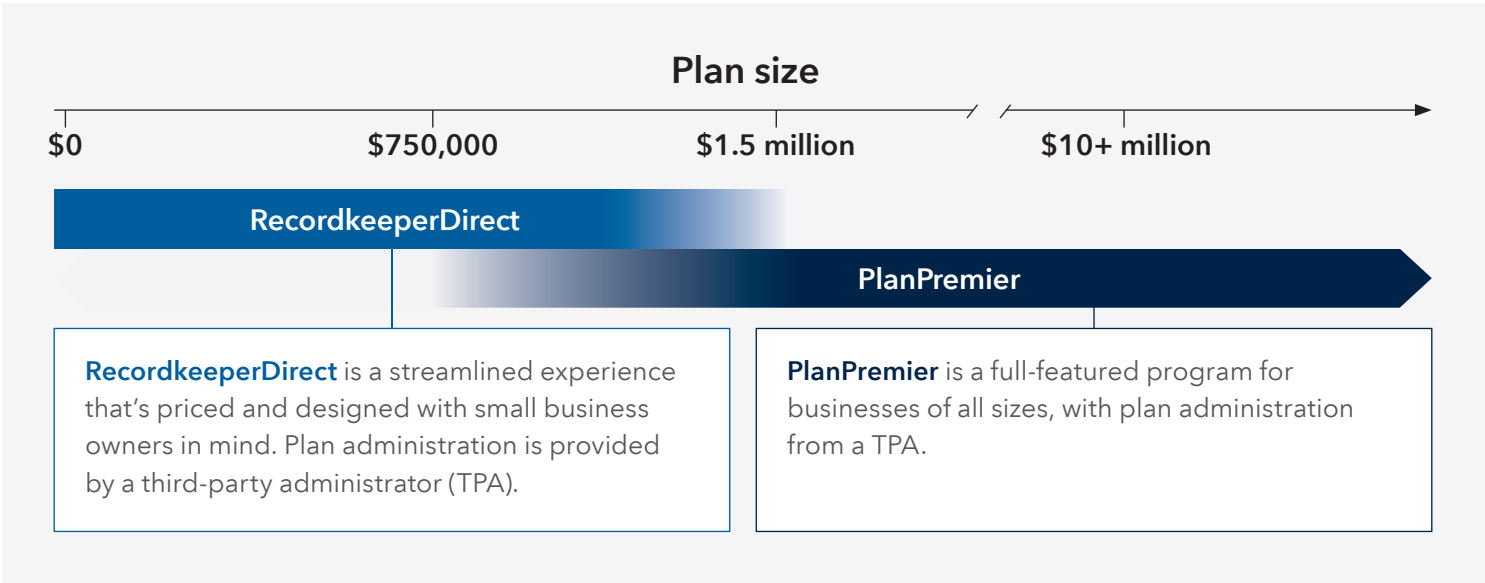





Find the solution that fits your plan

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

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

	RecordkeeperDirect	PlanPremier-TPA
 Plan services		
Customized plan and investment review reports	Yes	Yes
Payroll integration	Yes	Yes
Online invoicing and ACH payments	Yes	Yes
Employee vesting tracking	Yes	Yes
Deferral election tracking	Yes	Yes
Corporate trustee services (additional fees may apply)	Yes	Yes
Notice delivery service (additional fees may apply)	Yes	Yes
Beneficiary tracking (additional fees may apply)	Yes	Yes
Pre-approved plan document	Provided by TPA	Provided by TPA
Compliance testing	Provided by TPA	Provided by TPA
Form 5500 preparation	Provided by TPA	Provided by TPA
Interactive analytics dashboard to monitor plan health	No	Yes
Auto enrollment and escalation services	Yes	Yes
Eligibility tracking and notification	Yes	Yes
 Participant services		
Online enrollment	Yes	Yes
Customized enrollment education website, emails and materials, including Spanish materials	Yes	Yes
Mobile app	Yes	Yes
Educational content and interactive planning tools	Yes	Yes
Investment and fee disclosure	Yes	Yes
Online distribution requests	Yes	Yes
Online loan requests	Yes	Yes
Personalized income projections, peer comparisons, health care cost estimates and budgeting tools	No	Yes
Spanish website and statements	No	Yes
Distribution kits mailed to participants	No	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.

This content, developed by Capital Group, home of American Funds, should not be used as a primary basis for investment decisions and is not intended to serve as impartial investment or fiduciary advice.

All Capital Group trademarks mentioned are owned by The Capital Group Companies, Inc., an affiliated company or fund. All other company and product names mentioned are the property of their respective companies.

Capital Client Group, Inc.

Lit. No. RPEGFL-472-01250 CGD/10264-S104784 © 2025 Capital Group. All rights reserved.