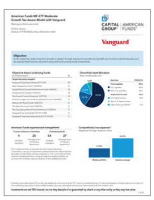
Model portfolio resources for you and your clients

Stay up-to-date on results and commentaries to improve client conversations

The success of your practice is important to us, which is why we strive to provide timely sales and servicing support for the American Funds Model Portfolios. We hope you find these materials helpful as you engage with your clients and review their investments.

As a reminder, our model portfolios are managed by the Portfolio Solutions Committee (PSC), a team of investment professionals who, on average, have 30 years* of industry experience. The PSC is supported by the Capital Solutions Group (CSG), which is responsible for multi-asset research and investment recommendations along with monitoring our solutions. Their best thinking is reflected in the materials listed here.



Fact sheets

Our model fact sheets provide returns data and other critical information for you to update your clients on their investments.

Timing: Ten business days after the end of each quarter.

Quarterly commentary

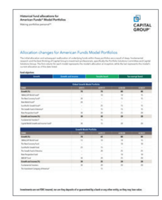
Our quarterly commentary summarizes the current state of the economy and markets. Model results and index comparisons are also included, as are returns for the models' underlying funds.

Timing: Four weeks after the end of each quarter.

Portfolio insights

Our best thinking on portfolio construction gives you insights into trends and ideas, as well as a look into how the PSC manages our models. Whether you rely on models, build your own portfolios, or do both, you'll find fresh ideas on positioning client portfolios in different market environments.

Timing: Once each quarter.



Reallocation update

Whenever the PSC makes changes to the underlying funds within our models, this update not only gives you timely information on these reallocations but also insights into why they matter.

Timing: Updates are available on the same day that reallocations take effect.

Your Capital Group sales representatives can further assist you with a wide array of materials and ideas. You can also see the latest on our model portfolios and links to our servicing offerings online at **https://www.capitalgroup.com/advisor/investments/modelportfolios.html**.

*Industry experience is as of 12/31/21.

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

Model portfolios are provided to financial intermediaries who may or may not recommend them to clients. The portfolios consist of an allocation of funds for investors to consider and are not intended to be investment recommendations. The portfolios are asset allocations designed for individuals with different time horizons, investment objectives and risk profiles. Allocations may change and may not achieve investment objectives. If a cash allocation is not reflected in a model, the intermediary may choose to add one. Capital Group does not have investment discretion or authority over investment allocations in client accounts. Rebalancing approaches may differ depending on where the account is held. Investors should talk to their financial professional for information on other investment alternatives that may be available. In making investment decisions, investors should consider their other assets, income and investments. Visit capitalgroup.com for current allocations.

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