

Build a bridge to wealth management

Help retirement plan participants become wealth clients with the tools and resources of an established guide.

Plan participants have changing needs as they move through their working careers and approach retirement. You can evolve your service to support these transitions with efficient and scalable wealth management programs. Our teams can help you capture this growth opportunity with investment solutions, wealth strategies, educational resources and consultation services.

Bridge to wealth

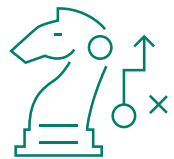
Insights & practice management

Consultants and resources to help businesses scale and thrive



Investment solutions




Models and portfolios to fit a range of client objectives



Wealth & portfolio strategies

Strategic consultation, including high net worth specialists

Bridge to wealth

STAGES	KEY FEATURES	
 <p>Investment solutions Create portfolios from models and investment options for accounts of various size and objectives.</p>	<ul style="list-style-type: none"> • Models • Mutual funds • Exchange-traded funds • Fund of funds • Separately managed accounts 	<ul style="list-style-type: none"> • Fund strategies including: <ul style="list-style-type: none"> – All active – Active-passive – Retirement income – Tax-aware
 <p>Insights & practice management Get help to run an efficient and engaging wealth management practice.</p>	<ul style="list-style-type: none"> • Advisory consultants • White-labeled newsletters, content and resources to engage clients 	<ul style="list-style-type: none"> • Actionable insights • Advisor benchmarking service • Elite engagement
 <p>Wealth & portfolio strategies Help end-clients pursue financial objectives at various levels of sophistication.</p>	<ul style="list-style-type: none"> • Wealth strategists • Portfolio consultation and investment due diligence • Platform model delivery • High net worth services <ul style="list-style-type: none"> – Outsourced advisory services 	<ul style="list-style-type: none"> • American Funds F-2 Direct-at-Fund program <ul style="list-style-type: none"> – IRA – Non-qualified • Advisor-sold ABLE (Achieving Better Life Experience) account • Employer-sponsored 529s



Be a champion

Take the first step toward building a comprehensive retirement and wealth management program today. Visit www.capitalgroup.com for more details.

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