CAPITAL GROUP® | AMERICAN FUNDS®

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

Investment solutions

Models and portfolios to fit a range of client objectives

Insights & practice management

Consultants and resources to help businesses scale and thrive

Wealth & portfolio strategies

Strategic consultation, including high net worth specialists

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

Bridge to wealth

STAGES	KEY FEATURES	
Investment solutions Create portfolios from models and investment options for accounts of various size and objectives.	• Models • Mutual funds • Exchange-traded funds • Fund of funds • Separately managed accounts	• Fund strategies including: – All active – Active-passive – Retirement income – Tax-aware
Insights & practice management Get help to run an efficient and engaging wealth management practice.	• Advisory consultants • White-labeled newsletters, content and resources to engage clients	• Actionable insights • Advisor benchmarking service • Elite engagement
Wealth & portfolio strategies Help end-clients pursue financial objectives at various levels of sophistication.	• Wealth strategists • Portfolio consultation and investment due diligence • Platform model delivery • High net worth services – Outsourced advisory services	• American Funds F-2 Direct-at-Fund program – 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.

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.

Capital Client Group, Inc.

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