CAPITAL GROUP® | AMERICAN FUNDS®

Step up your practice with PlanPremier-TPA

PlanPremier-TPA is designed to provide you and your clients with greater **service,** robust recordkeeping **features** and **fixed-dollar pricing.**

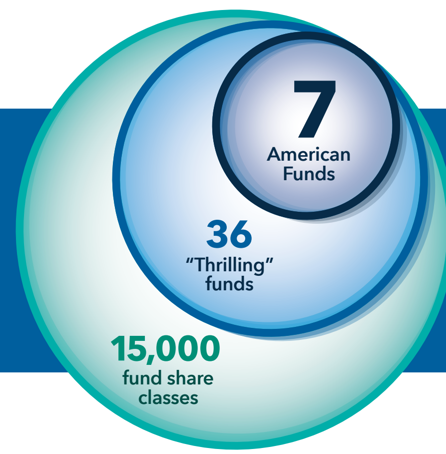
Flexible investment options from multiple fund families

Build a better 401(k) with investments from many well-respected investment managers, including the American Funds Target Date Retirement Series®.*

Seven American Funds among Morningstar's "Thrilling 36"†

Out of more than 15,000 mutual fund share classes researched, only 36 were deemed "Thrilling" by Morningstar – and seven of those are American Funds.

All seven American Funds are part of the **American Funds Target Date Retirement Series®.**



Selected most often by plan advisors
managing less than $50M in DC AUM

Is a company I trust | Is reliable | Easy to do business with

Escalent, Cogent Syndicated, Retirement Plan Advisor Trends™, October 2024. Methodology: 411 respondents participated in a web survey conducted September 9-17, 2024. For "Ownership" of Core Brand Attributes – Tier 1, among 195 financial advisors managing less than $50M in defined contribution (DC) assets under management (AUM), Capital Group | American Funds was selected most often in response to the question, "Which – if any – of these DC plan providers are described by this statement … 'is a company I trust,' 'Is reliable' and 'Easy for advisors to do business with'?" Capital Group has provided input on some of the questions to be included in Cogent surveys over time. Additionally, Capital Group made a subscription investment to Cogent Syndicated to access a detailed version of the Retirement Plan Advisor Trends report.

*Availability of fund families may depend on the plan's share class. There are no proprietary fund requirements when our target date series is used for conversion.

†Source: Morningstar, "The Thrilling 36" by Russel Kinnel, August 20, 2024. Morningstar's screening took into consideration expense ratios, manager ownership, returns over manager's tenure, and Morningstar Risk, Medalist and Parent ratings. The universe was limited to share classes accessible to individual investors with a minimum investment no greater than $50,000, did not include funds of funds, and must be rated by Morningstar analysts. Class A shares were evaluated for American Funds. Visit morningstar.com for more details. Not all seven funds listed in the "The Thrilling 36" list are in each target date fund. Underlying funds may change over time.

Fixed-dollar pricing

Our transparent, fixed-dollar approach to pricing is designed to help your clients save money – for all investment menu selections.

- Pricing is based on the **number of participants,** not plan assets
- Recordkeeping **costs don't go up** as plan assets grow
- Sponsors can **choose how to pay** the plan's costs

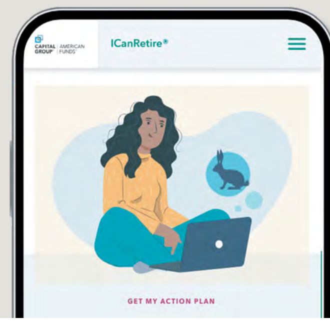
Pricing for PlanPremier-TPA

Participants with account balances	PlanPremier-TPA recordkeeping fees	
	Base fee	Per participant
1-25	$2,200	$100
26-300	2,200	60
301-500	3,700	55
501-1,000	6,200	50
1,001 or more	8,200	48

Interactive participant website and app

Boost participation and engagement with retirement income projections, peer comparisons, outside account integration and other valuable budgeting tools.

ICanRetire® is our exclusive participant engagement program that offers targeted emails, easy-to-understand action plans and more to help drive retirement plan success.



Trust an industry leader

Dedicated to investors

More than 2.6 million plan participants count on us to pursue their retirement goals.*

A trusted recordkeeper

More than 67,000 businesses and their employees rely on our retirement plan recordkeeping services.*

A top asset manager

With $2.8 trillion assets under management, we're one of the world's largest investment management organizations.*

*As of 9/30/24.

We're dedicated to helping you and your clients succeed

Visit capitalgroup.com to learn more about PlanPremier-TPA.

To get started helping more clients with this full-service solution, call us at (800) 421-9900.

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.

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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.

All other company and product names mentioned are the property of their respective companies.

Capital Client Group, Inc.