Capital Group Target Date Retirement Series
Participant resources

Your guide to participant success

Participant communications made easy

Our suite of participant materials and re-enrollment resources gives you everything you need to ensure a smooth transition to Target Date Retirement Series from Capital Group, home of American Funds®.

We provide the tools for success

We designed this comprehensive system of resources with you in mind, so you can ensure a successful participant experience.

- **Flexibility –** A combination of digital and print tools allows you to shape the communication process to best fit your needs.
- **Customization –** Tailor your communications to make them unique to your company and participants.
- **Simplicity –** We provide the resources you need to take the complexity out of participant communications and oversee a successful target date conversation.

Target date fund enrollment

Use these resources to inform participants about plan changes.

Welcome letter

Enrollment presentation

Target date education

Provide high-level information to educate participants about this style of investing.

Intro to target date funds video

Deep dive brochure

Quick read pamphlet

Comprehensive educational website

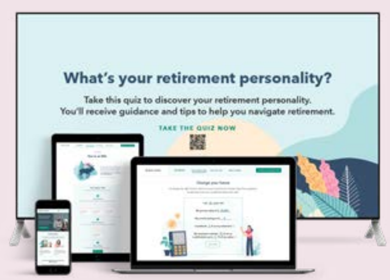
Target date series information

Share key facts, statistics and holdings information for each fund in which participants are invested.

Individual vintage fact sheets

Participant engagement

Help participants stay on track with a digital program that includes action plans and targeted messages to keep them connected with their goals.



ICanRetire®

Important information about objectives, risks, charges and expenses for collective investment trusts is contained in the Characteristics Statement, which can be obtained from Capital Group or participants' plan provider or employer.

Advisory services offered through Capital Research and Management Company (CRMC) and its RIA affiliates. Capital Client Group, Inc., member FINRA.

Although the 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. Investment professionals manage the portfolio, moving it from a more growth-oriented strategy to a more income-oriented focus as the target date gets closer. The target date is the year that corresponds roughly to the year in which an investor is assumed to retire and begin taking withdrawals. Investment professionals continue to manage each portfolio for approximately 30 years after it reaches its target date.

Collective Investment Trusts (CITs) are available for investment only to certain qualified retirement plans. Capital Group CITs are maintained by Capital Bank and Trust Company ("trustee"), which has retained an affiliate to serve as investment adviser to the trustee.

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