RecordkeeperDirect® Integrated
Your push-button retirement plan solution

CAPITAL GROUP® | AMERICAN FUNDS®

Easy does it – let your plan work for you, not the other way around

Sponsoring a retirement plan becomes simplified with RecordkeeperDirect Integrated. Combining the extensive capabilities of four providers, we've integrated retirement plan services into a seamless experience. You and your business could benefit from important features and flexibility that streamline operations, including:

- **Plan reviews and employee education** by Edward Jones
- **Recordkeeping and investments** by Capital Group, home of American Funds
- **Plan administration** by MAP*, operating as a plan fiduciary†
- **Investment recommendations and monitoring** by Wilshire, operating as an investment fiduciary†

RecordkeeperDirect Integrated

- ☐ **Administrative relief** from the obligations of sponsoring a retirement plan
- ☐ **Integrated suite** of investments, recordkeeping, administration and fiduciary services
- ☐ **Retirement-focused target date series** from Capital Group's suite of American Funds
- ☐ **Easy enrollment and engaging education** for participants
- ☐ **Great alternative to mandatory** state-sponsored retirement plans
- ☐ **Straightforward** pricing
- ☐ **Tax credits for startup plans** – see eligibility requirements

Easy for you, effective for your employees

Reduce the worry and burden of sponsoring a retirement plan with RecordkeeperDirect Integrated. We've already assembled most essential services – simplifying your role as a plan sponsor while seeking to enhance employees' financial future.†

Improve your employees' retirement readiness

RecordkeeperDirect Integrated offers employees a digital enrollment experience along with engagement and educational programs that can help your workforce save and invest for their future.

Talk with your Edward Jones professional today

Let us show you how **RecordkeeperDirect Integrated** can help offer you a high-quality retirement plan.

* Third-party administrator (TPA) shown is for illustrative purposes only. The RecordkeeperDirect Integrated plan solution offers you the choice of three TPA options: (1) Aboon (2) AMP and (3) MAP Retirement. You should discuss each of these options with your Edward Jones financial professional. Please view the Edward Jones Retirement Plan Services Brochure at https://www.edwardjones.com/us-en/disclosures/account-agreements/investment-advisory programs/retirement-plan-services for more information on the investments that affiliates of Edward Jones may use to help deliver its service offerings.

† As plan sponsor, you retain certain fiduciary responsibilities that cannot be delegated to Aboon or Wilshire, including the selection and monitoring of service providers. You are also responsible for reviewing all service provider agreements.

About Capital Group

Capital Group is dedicated to optimizing the overall retirement plan experience for better participant long-term outcomes. Capital Group | American Funds was among the plan providers selected most often for the following attributes important to plan sponsors[1]:

- ☐ Reliable
- ☐ A company I trust
- ☐ Best-in-class target date solutions
- ☐ Delivers superior retirement outcomes
- ☐ Best-in-class plan sponsor service and support

Dedicated to investors

More than **2.6 million** plan participants count on us to pursue their retirement goals.[2]

A trusted recordkeeper

Over **68,000** businesses and their employees rely on our retirement plan recordkeeping services.[2]

A top asset manager

With more than **$2.5 trillion** assets under management, Capital Group is one of the world's largest investment management organizations.[2]

[1] 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 $50 million in defined contribution (DC) assets under management (AUM), Capital Group | American Funds was the plan providers 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,' and 'is reliable' and for the category 'Best-in-class plan sponsor service and support'. For "Ownership" of Core Brand Attributes – Tier 2, Capital Group was among the managers most selected for the category 'Delivers superior retirement outcomes.' For "Ownership" of Core Brand Attributes – Tier 3, Capital Group was selected most often for the category 'Best in class target date solutions'.

[2] As of 12/31/24. Participants in Capital Group 401(k), 403(b), SEP IRA and SIMPLE IRA plans. Number of businesses in proprietary recordkeeping solutions.

Investors should carefully consider investment objectives, risks, charges and expenses. This and other important information is in the fund prospectuses and summary prospectuses, which can be obtained from a financial professional, and should be read carefully before investing.

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.

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.

Capital Client Group, Inc.