



**CAPITAL  
GROUP®** | **AMERICAN  
FUNDS®**

Investor reference guide





## **Thank you** for choosing Capital Group, home of American Funds

Whether you're investing for yourself or a loved one, you've taken a key step in turning your financial goals into reality. Your financial future is important, and we value the trust you've placed in us.

## It's easy to access your account online

1

### Get ready

You'll need your **account number** and the last four digits of the **Social Security number** of the primary account holder.

2

### Go!

Visit **capitalgroup.com/getstarted** to log into your account for the first time.

## Security

Capital Group takes the protection of your personal information and accounts very seriously. Our robust security program and infrastructure includes a team of cybersecurity and risk management professionals who continuously monitor and safeguard your data.

We believe that online account security is a collaborative effort and encourage you to register your account(s) for online access as soon as possible. When registering, follow the steps below to strengthen the security of your account(s).

Learn more about how we protect your account(s) and how you can help at **capitalgroup.com/accountsecurity**.

## Three quick ways to strengthen account security

1. Create a smart, custom password, change it regularly and never share it.
2. Keep your contact information up to date to receive account activity and security notifications.
3. Sign up for paperless delivery of important documents.

It's important to keep your name, address, bank accounts and other account information up to date. Most information can be changed online. You can also download the necessary forms at **[capitalgroup.com/forms](https://capitalgroup.com/forms)**.

### Online

Take advantage of a wide range of features on our website to help manage your account(s).

#### Your investments

- Check your account balance(s)
- Review your personal rate(s) of return
- Review transaction history
- Complete one-time transactions
- Add, update and delete automatic transactions

#### Your profile and settings

- Change your user name and password
- Change your address, phone number and email address
- Add or update bank information for online investing
- Choose paperless delivery of your important documents

### Link your bank account for investments and withdrawals

Visit **[capitalgroup.com/linkbank](https://capitalgroup.com/linkbank)** to learn how to link your bank account to your Capital Group account(s).





## Phone

To speak with an associate, call **(800) 421-4225**. We're available Monday through Friday, between 8 a.m. and 7 p.m. Eastern time.

## Mail

To invest, send a letter of instruction to the nearest American Funds service center. Be sure to include:

- Your name, account number and phone number
- Amount to invest into each fund

Investment checks should be made payable to American Funds Service Company or the fund in which you are investing.

To take a withdrawal, mail a completed distribution form to the nearest American Funds service center.

## Online

**capitalgroup.com**

## Phone

**(800) 421-4225**

You can use our automated phone service 24/7 to check your account balance(s), fund prices and more.

You can also speak with an associate Monday through Friday, between 8 a.m. and 7 p.m. Eastern time. For website assistance, enter ext. 99.

If you use a teletypewriter (TTY) or other telecommunication device for the deaf (TDD), you may contact us via a relay service.

## Outside the U.S.

**+1 (757) 670-4900**

Available Monday through Friday, 8 a.m. to 5:00 p.m. Eastern time

**+1 (949) 975-5000**

Available Monday through Friday, 10 a.m. to 7:00 p.m. Eastern time

## Go paperless

Looking for a faster, safer and more reliable way to receive your account documents? Sign up for paperless delivery and we'll email you when the following documents are available online:

- Quarterly statements
- Transaction confirmations
- Prospectuses and reports
- Tax forms

# Mail

	Indiana service center	Virginia service center
For residents of:	AK, AZ, CA, CO, HI, IA, ID, IL, IN, KY, MI, MN, MT, ND, NE, NV, OH, OR, SD, UT, WA, WI, WY and all locations outside the United States.	AL, AR, CT, DC, DE, FL, GA, KS, LA, MA, MD, ME, MO, MS, NC, NH, NJ, NM, NY, OK, PA, RI, SC, TN, TX, VA, VT and WV.
		
For American Funds Service Company®	P.O. Box 6007 Indianapolis, IN 46206-6007	P.O. Box 2280 Norfolk, VA 23501-2280
For Capital Bank and Trust Company	P.O. Box 6164 Indianapolis, IN 46206-6164	P.O. Box 2560 Norfolk, VA 23501-2560
For CollegeAmerica®/ ABLEAmerica®	P.O. Box 6273 Indianapolis, IN 46206-6273	P.O. Box 2713 Norfolk, VA 23501-2713
For overnight mail (all accounts)	12711 N. Meridian St. Carmel, IN 46032-9181	5300 Robin Hood Rd. Norfolk, VA 23513-2430

# How The Capital Advantage<sup>®</sup> works for you

## **Aligned with investor success**

Our investment philosophy is based on doing what we believe is right for our clients.

## **The Capital System<sup>SM</sup>**

Our proprietary multi-manager investment approach combines independent decision-making and teamwork.

## **Built to last**

Since 1931, we've managed investments with the goal of helping long-term investors like you succeed.

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

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.