

Retirement plan services

The value of a TPA



Capital Group, home of American Funds, has focused on providing superior long-term results since 1931.

With a TPA, financial professionals can focus on what they do best

Third-party administrators (TPAs) can help you build your retirement plan business and reduce your administrative burden.

Win more business

Increase plan sponsors' confidence and win more business by delivering an effective TPA solution for their plans' administrative and compliance needs.

Add TPA experience

Help plan sponsors maximize their benefits through creative plan design, manage plan restatements and navigate complex regulatory requirements.

Focus on your practice

Leverage the experience of a TPA to help you manage more plans without expanding your staff. This approach gives you more time to support other areas of your practice.

Provide local support

TPAs can often provide face-to-face support to help plan sponsors of both large and small plans deal with complex retirement plan matters and any issues that may require extra attention.

Benefit from loyal client relationships

TPAs often earn plan sponsors' trust as an independent third party. You can benefit from financial professional referrals and valuable feedback to help you better serve plan sponsors.

Improve retention rates

TPAs work closely with plan sponsors and can help minimize client loss.

Capital Group offers the following products for use with a TPA:

- PlanPremier®-TPA
- RecordkeeperDirect®

The TPA can help you choose the best option for your client's plan.

98%

The percentage of Capital Group retirement plans partnered with a TPA

As of 3/31/2025

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

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