Guide for managing your clients' accounts online

CAPITAL GROUP®

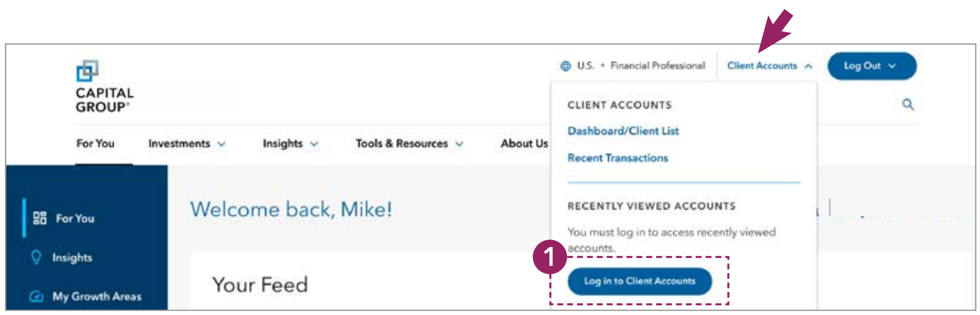
Tools to help you manage your book of business

Client Accounts

- ☑ Review your total assets, clients' account balances and recent activity
- ☑ Check your personalized dashboard for client alerts, news and updates
- ☑ Process transactions and complete account maintenance for your clients

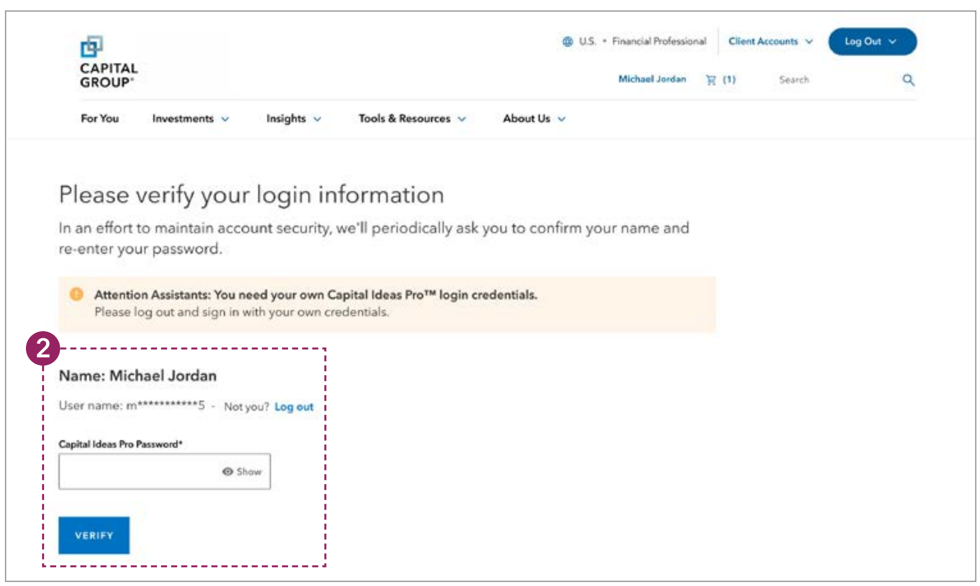
Accessing Client Accounts

❶ Select **Log in to Client Accounts** from the drop-down menu



❷ Enter/verify your **Capital Ideas Pro™** user name and enter your password. You will also receive a one-time passcode to verify your identity.

If you or your assistant have never accessed Client Accounts before, visit capitalgroup.com/getaccess for step-by-step instructions.



Using Client Accounts

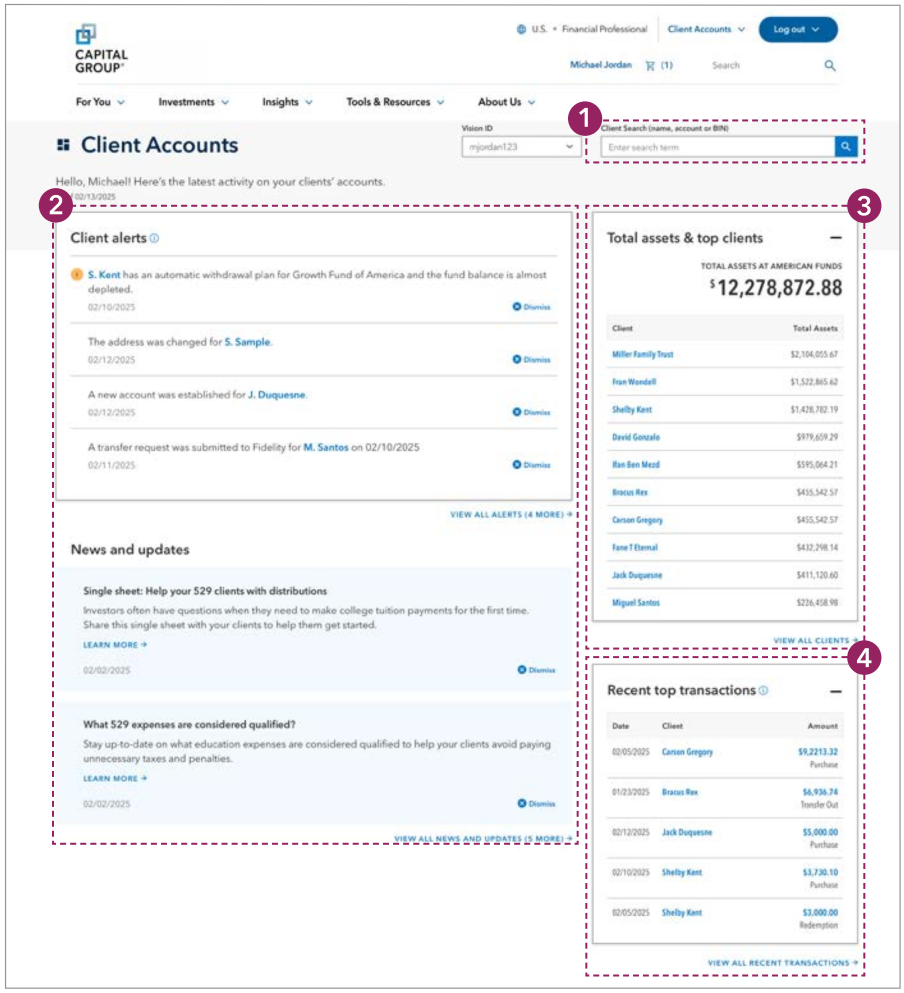
1 Client Search
Look up your clients' accounts by name, account number or BIN

2 Personalized dashboard
Check client alerts, news and updates

3 Total assets & top clients
Review your total assets and top clients at American Funds

4 Recent top transactions
Check recent top transactions for your clients

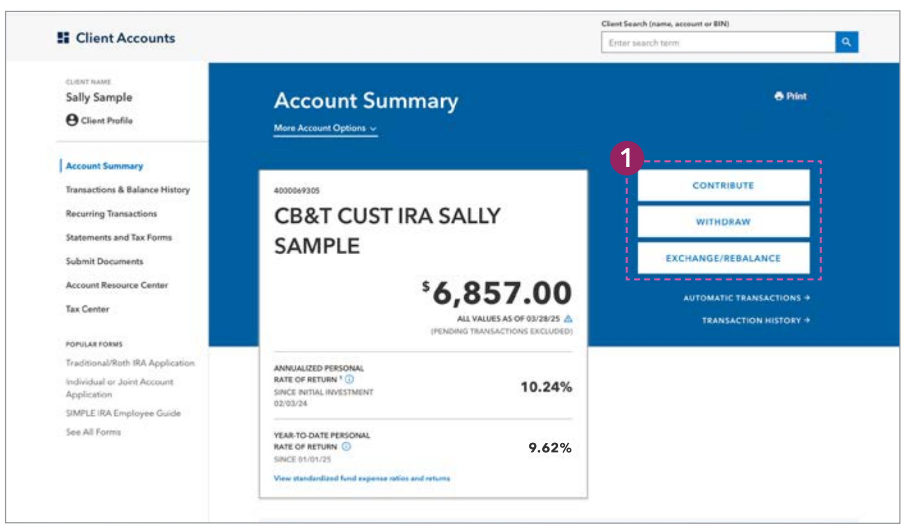
If you'd like to receive a summary of your client alerts via email, sign up at capitalgroup.com/notifications.



Transacting in Client Accounts

1 Transactions
Process transactions online:

- Investments
- Withdrawals
- Exchanges
- Rebalances



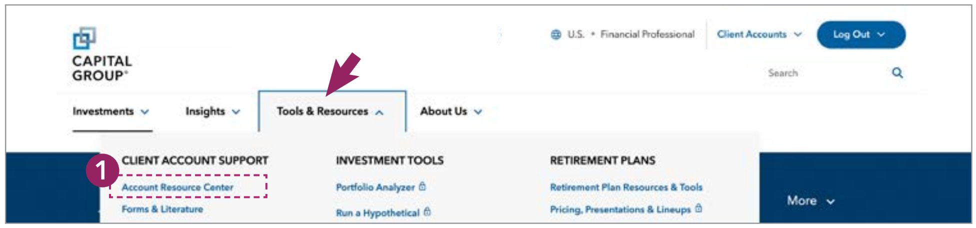
To learn more about Client Accounts, watch video tutorials and more, visit capitalgroup.com/overview or scan the QR code.

Account Resource Center

- ☑ Find information to help you set up and manage clients' accounts
- ☑ Access forms, reports and procedures
- ☑ Review important updates and popular topics and get answers to common questions

Accessing and using the Account Resource Center

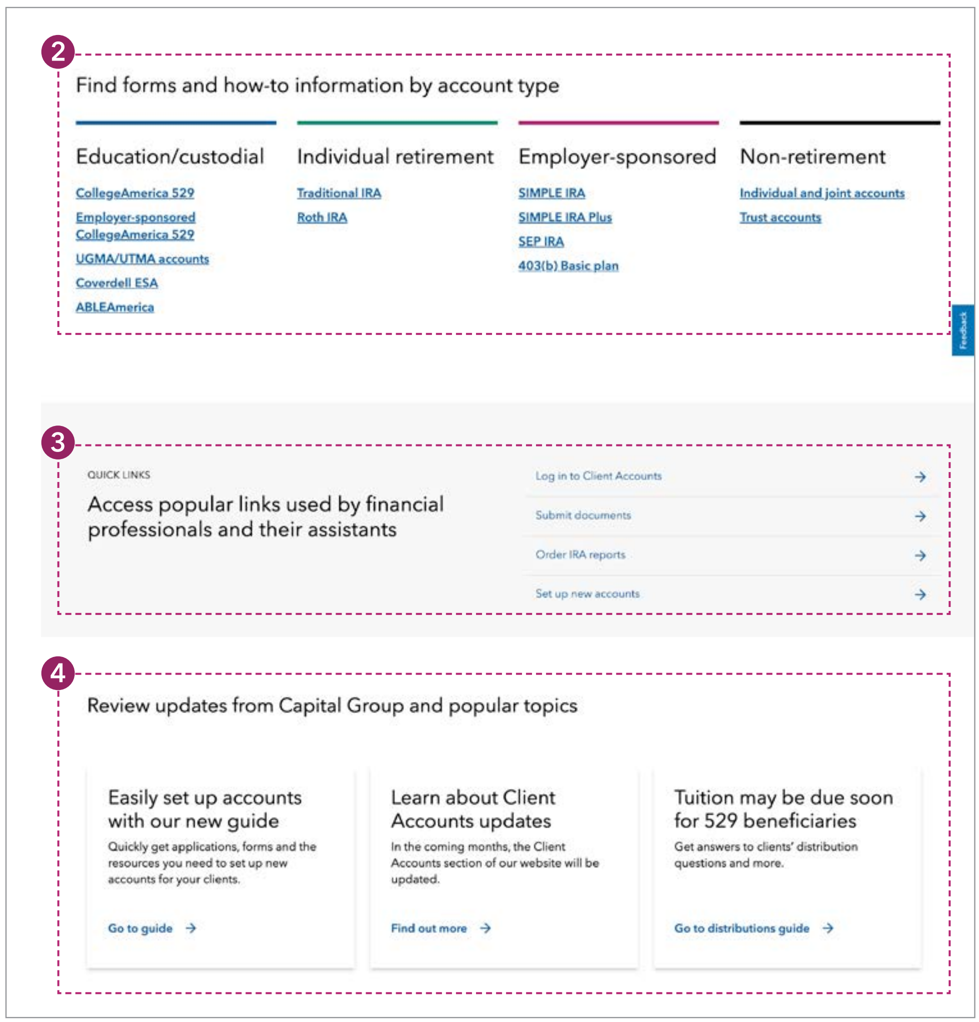
1. Access the **Account Resource Center** under **Tools & Resources**



2. Find forms and how-to information by account type

3. Use the quick links to go to Client Accounts, submit documents, order IRA reports or access the New Account Guide

4. Find important updates, popular topics and answers to common questions



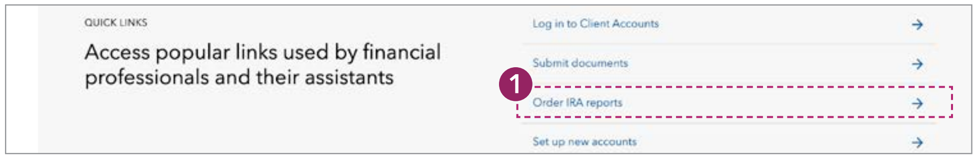
You can easily access the Account Resource Center at capitalgroup.com/resources or scan the QR code.

Ordering IRA reports

- ☑ Get reports for required minimum distributions (RMDs), beneficiary designations and contributions
- ☑ Plan ahead for client RMDs and IRA contributions
- ☑ Access information for your IRA clients in one place

Order IRA reports

1. From the Account Resource Center, go to **Order IRA reports** or visit capitalgroup.com/IRAreports



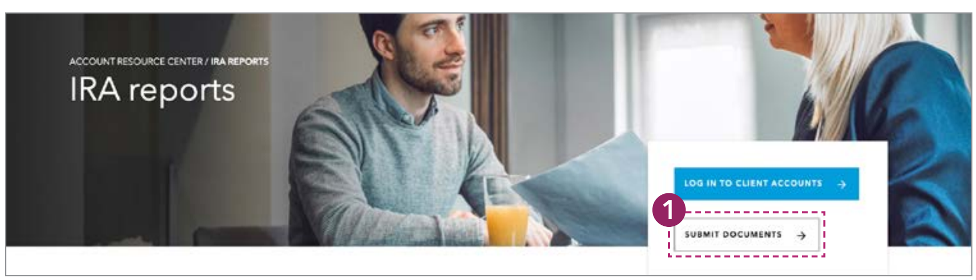
2. From **Order IRA reports,** order:
   - RMD reports
   - Contributions reports
   - Beneficiary designation reports

Submit documents online

- ☑ Easily and securely submit forms and applications online
- ☑ Submit any document you would normally fax
- ☑ Access the online submission tool from multiple places on our website

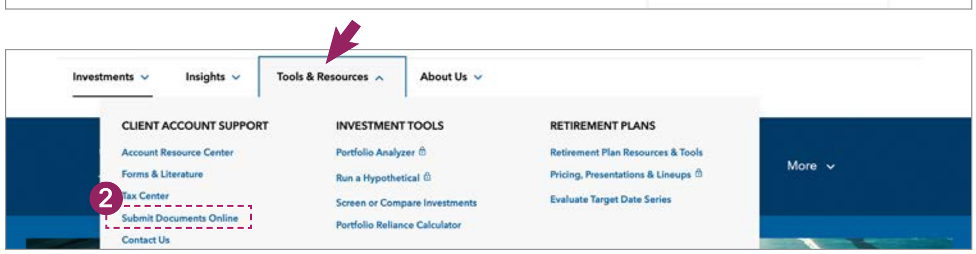
Three ways to locate the online submission tool

1. Select the **Submit Documents** button from any page in the Account Resource Center



2. Access **Submit Documents Online** under **Tools & Resources**

3. Visit capitalgroup.com/submitdocuments



Lit. No. MFGEBR-143-0426O CGD/9765-S109194