AMERICAN FUNDS®

From Capital Group

Multiple Perspectives. One Approach.®

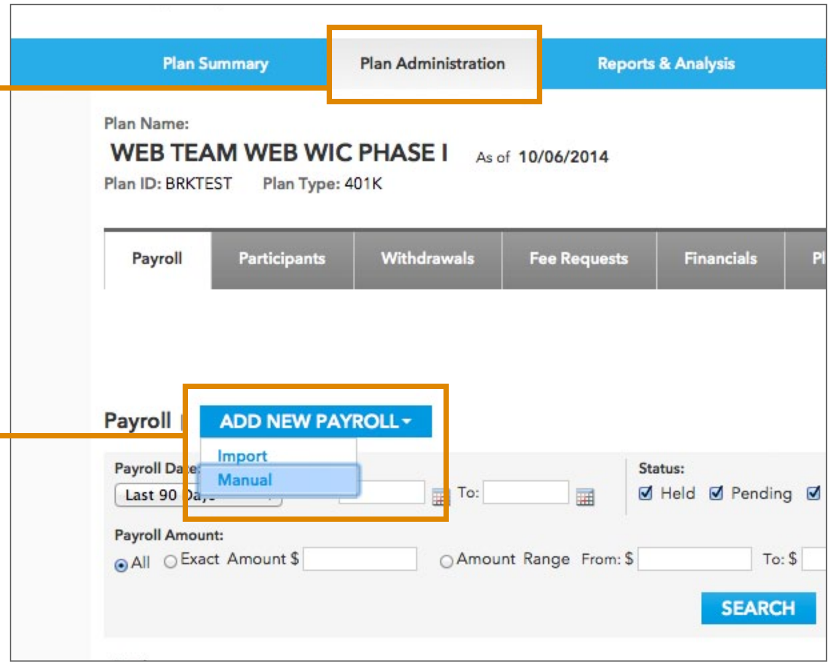
Manually Add a Payroll

American Funds Retirement Planning Center

1. Manually add a payroll

Click the **Plan Administration** tab. This takes you to the **Payroll** section.

Click **Add New Payroll** to select **Manual**.

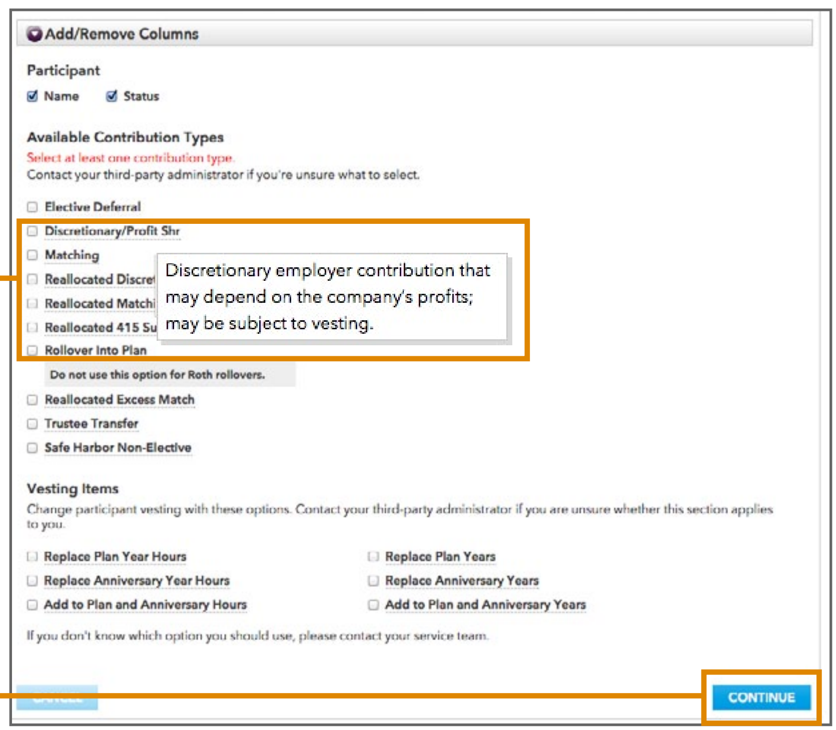


2. Select criteria

Select participant status and contribution types, such as elective deferral or matching.

Note: Not sure what to select? You can view a definition of each contribution type by hovering over the text with your cursor. (A dotted line indicates that a definition is available.) Or, contact your third-party administrator for assistance.

When finished, click **Continue**.

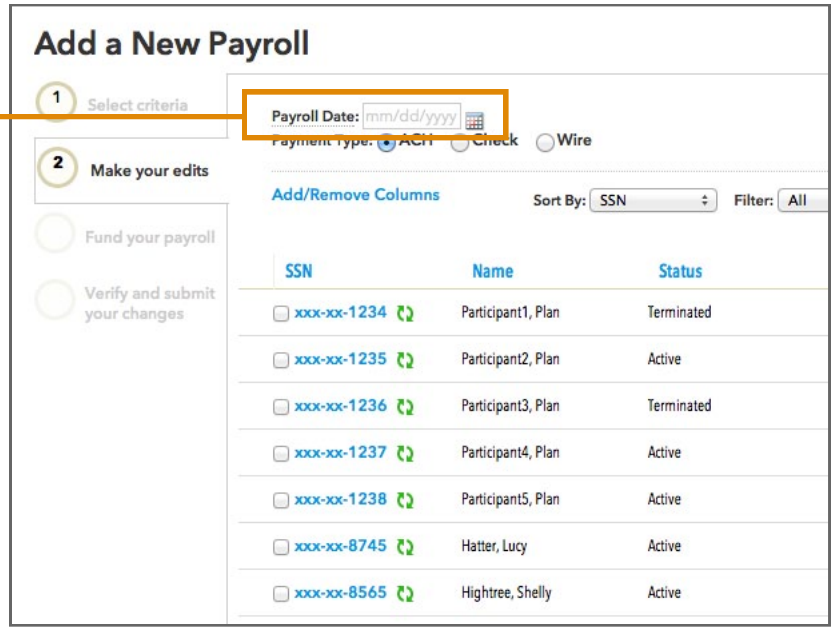


3. Update payroll, if necessary

Choose a payroll date, and enter the amount for each participant's contribution type.

Note: The payroll date determines when money will be transferred if you're using a current or upcoming date. (If you're using a date in the past, the money will be transferred the following business day.) Select a date in the future to set up a payment in advance. Contributions for payrolls transmitted using the current date:

- *Before 4 p.m. (EST) will be transferred at the close of the current business day.*
- *After 4 p.m. (EST) or on a weekend or holiday will be transferred at the close of the next business day.*



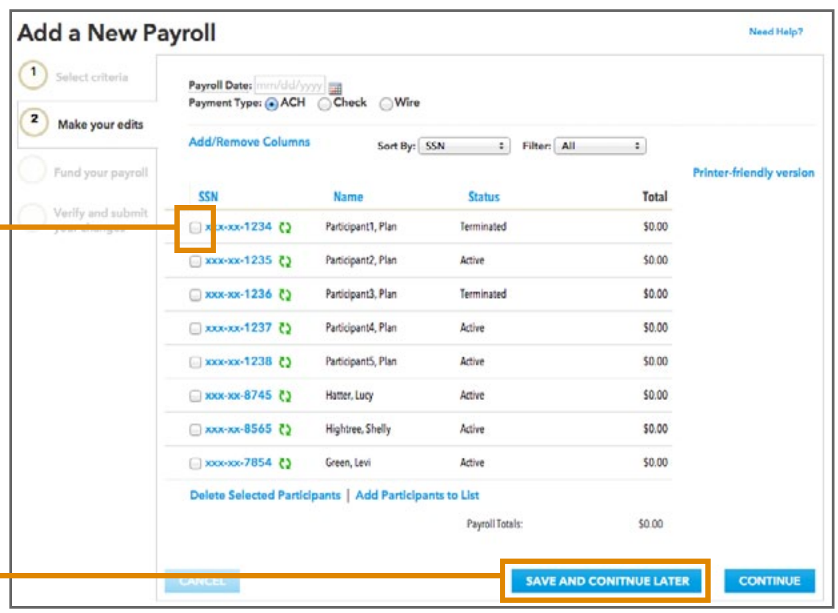
Enter your dollar amounts in the appropriate columns.

To add participants, click **Add Participants to List**. To remove participants from the payroll list, check the box next to their Social Security Number and click **Delete Selected Participants.**

To add a contribution type, click **Add/ Remove Columns** and make your selections.

When finished, click **Continue**.

*Note: Click **Save and Continue Later** to complete this task at another time. Your payroll will be saved with an In Progress status.*



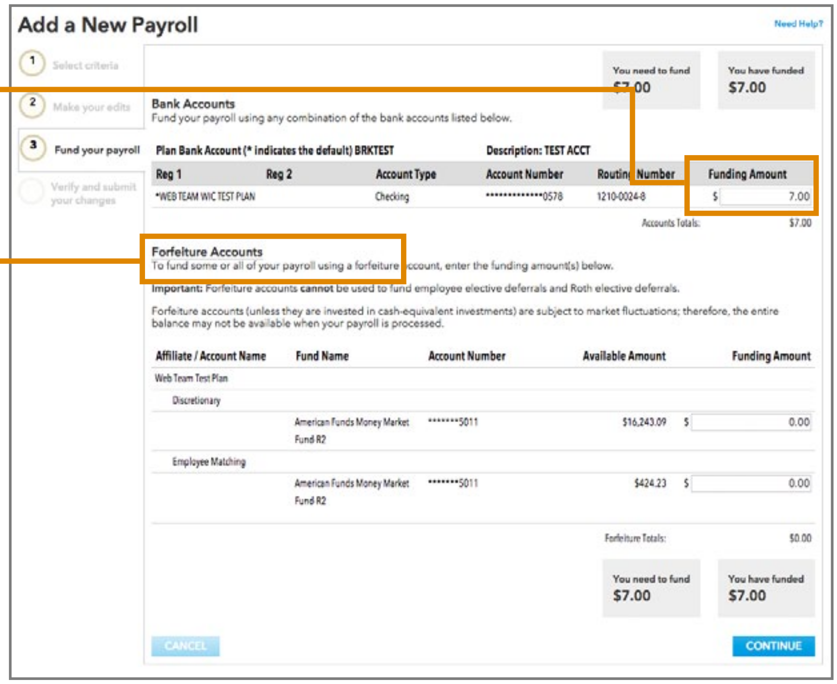
4. Fund payroll

Enter the funding amount to be withdrawn via ACH from your bank account(s).

To offset any employer contributions using forfeiture assets, enter the funding amount in the **Forfeiture Accounts** section.

Check the dollar amounts to confirm that the amount you need to fund matches the amount you have funded.

When finished, click **Continue.**



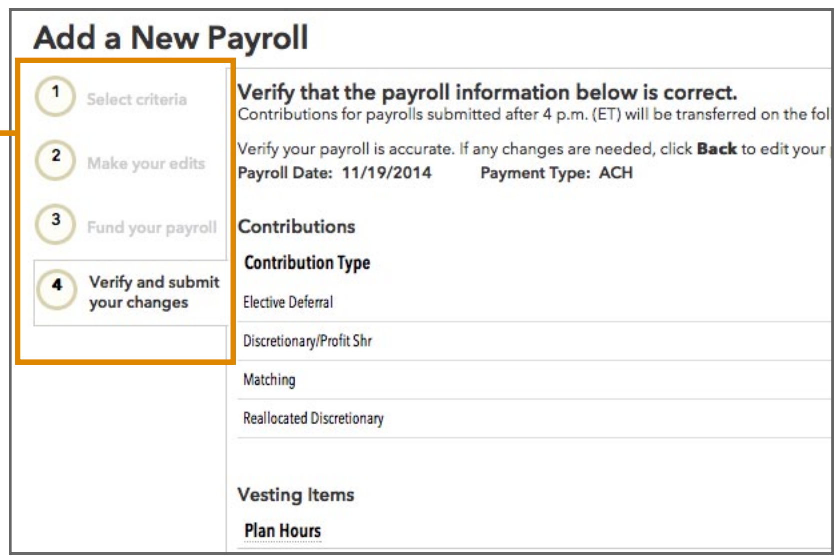
5. Verify changes

Review the payroll information for accuracy. To make any changes, click the numbered step indicator for the section you'd like to update.

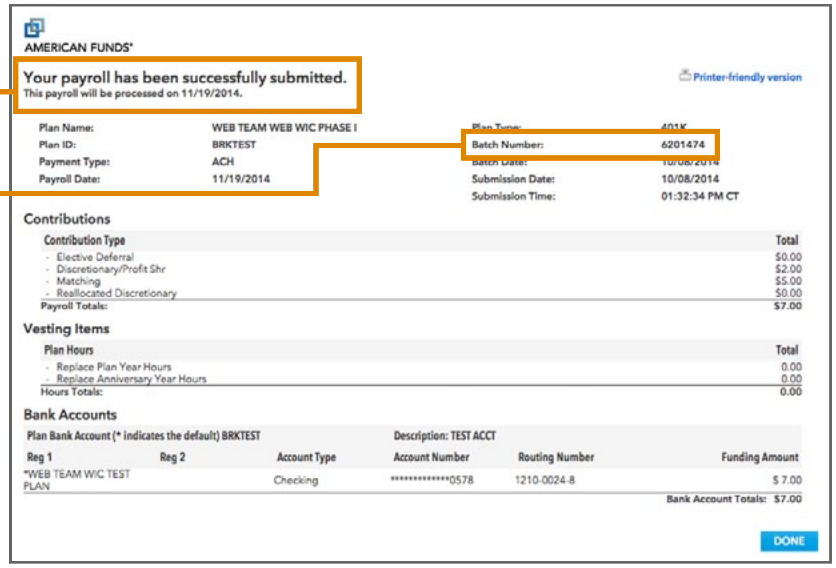
Note: You may need to re-enter some information when you go back to a prior step.

To receive an email notification when this payroll is submitted, enter your email address.

When finished, click **Submit.**



6. Confirmation of success



You will see a confirmation page stating that your payroll has been submitted.

To see the status, note the batch number, then close the confirmation page. Find this payroll in your payroll list using the batch number, and look in the Status column.

You can copy this payroll for future payrolls and bypass these steps. To do this, find this payroll in your payroll list, then click **Actions** to choose **Copy**.

For additional assistance, please go to the **Contact Us** section of the website.