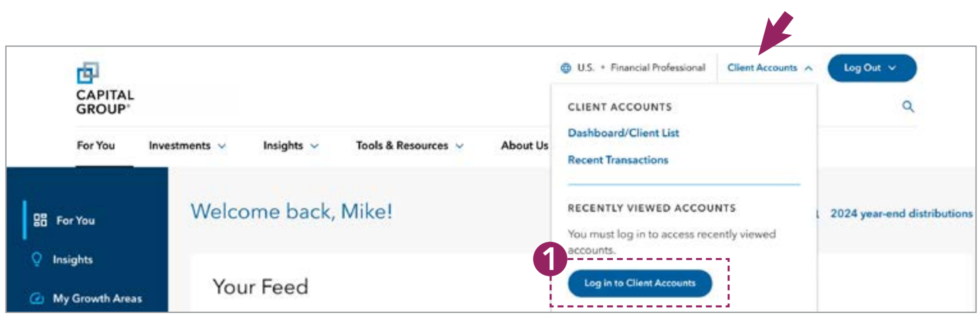
How Client Accounts can help you manage your book of business

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

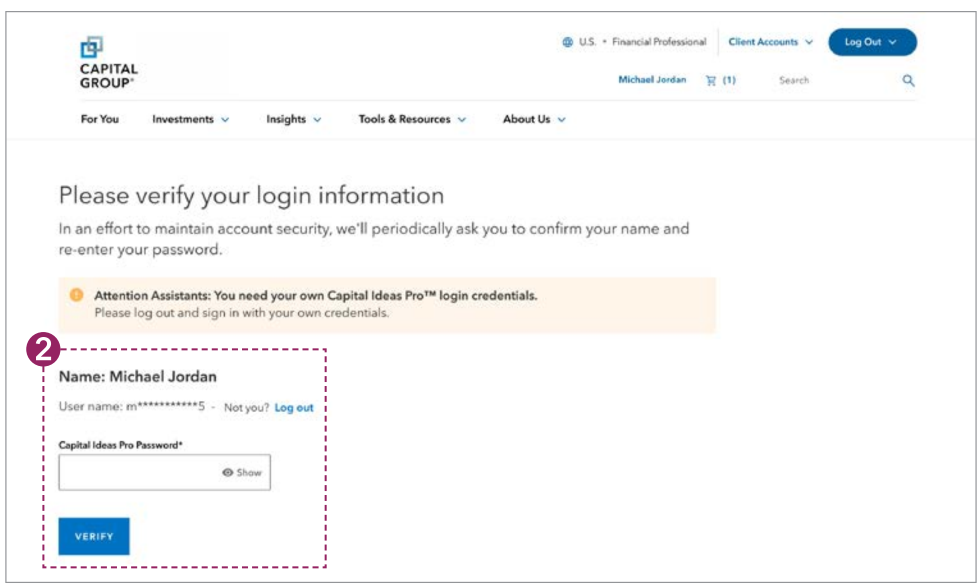
Accessing Client Accounts

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



2. 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.



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Financial professionals should always contact their back office to determine if there are any restrictions on the use of American Funds products, tools, services, websites and literature.

Using Client Accounts

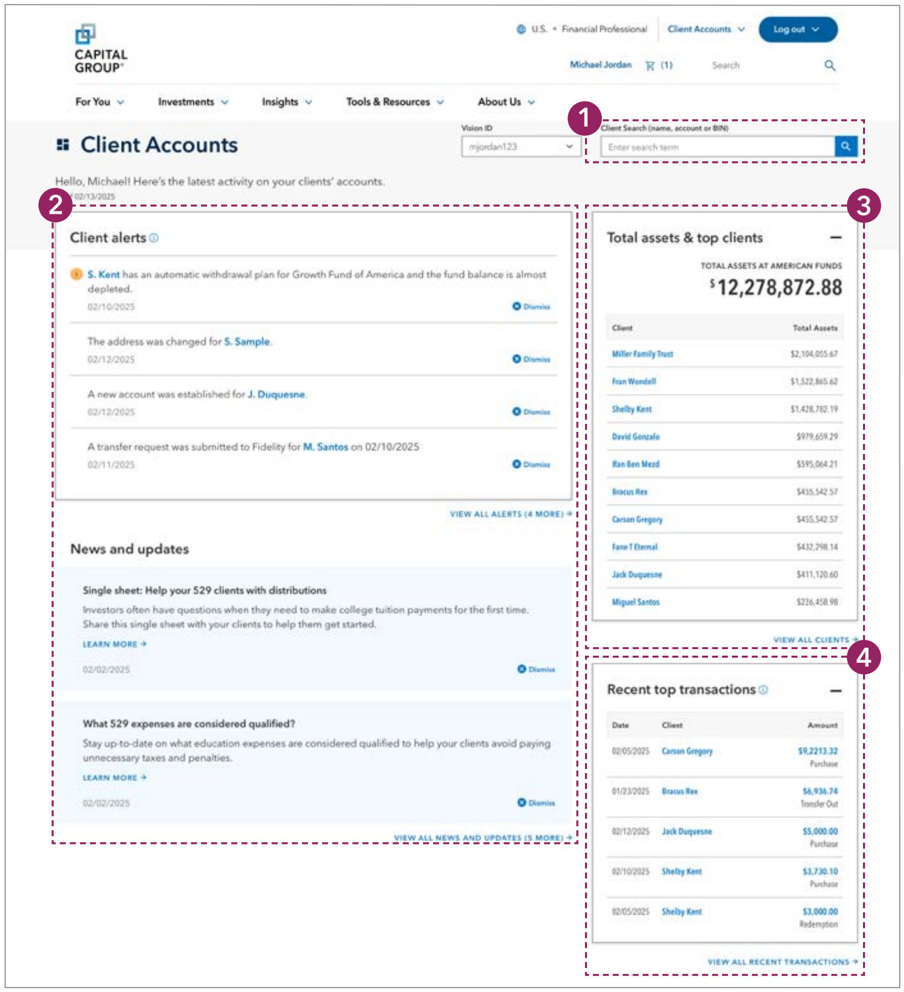
1 Client Search
Look up your clients' accounts by name, account number or BIN

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

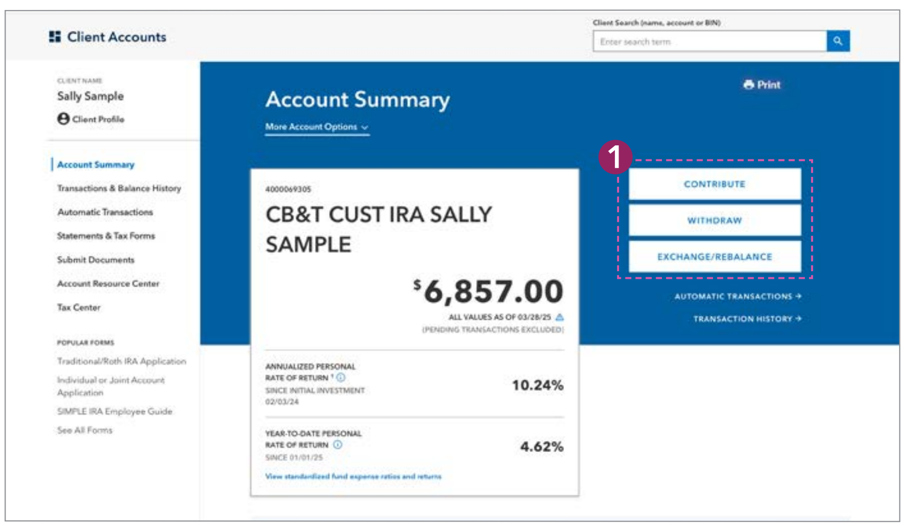
If you'd like to receive a summary of your client alerts via email, sign up at capitalgroup.com/notifications.



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.

Transactions and tasks you can complete in Client Accounts

Transactions

- Exchanges within the same account
- Investments/contributions
- Rebalances
- Withdrawals/distributions (Capital Bank and Trust Company [CB&T] IRAs,[1,2] CollegeAmerica accounts,[3] retail accounts[4])

Automatic options

- Automatic exchange plans – view only
- Automatic investment plans – add/modify/remove
- Automatic life expectancy distributions – view only
- Automatic life expectancy exchanges – view only
- Automatic rebalance plans – add/modify/remove
- Automatic withdrawal plans – add/modify/remove (retail accounts)
- Automatic withdrawal plans – view only (CB&T IRAs and CollegeAmerica accounts)

Account maintenance

- Bank information – add/remove (for investments only)
- Client's address – add/modify

Account information

- Account balance
- Beneficiary information (available on select account types)
- Client's contact information
- CollegeAmerica contribution and distribution summary
- Dividends and capital gains
- IRA/ESA contribution summary
- Pending and past transactions
- Personal rate of return
- Rights of accumulation
- Statement of intention
- Successor owner information (CollegeAmerica accounts)
- Personalized dashboard (account alerts, top clients, top recent transactions and more)

Account documents

- Quarterly statements
- Historical account balance statements
- Tax forms

You can also access your Capital Group accounts on the DST Vision® website. The two websites offer different options to help you manage accounts. To compare which tasks and transactions you can complete in Client Accounts versus DST Vision, go to **capitalgroup.com/compare**.

Footnotes/Important information:

[1] Cannot distribute more than $125,000. Can deposit to the bank only if the bank account (Automated Clearing House [ACH] option) has been linked and hasn't been modified in the last 10 calendar days. Can send proceeds via check only if the address hasn't been modified in the last 10 calendar days.

[2] Funds cannot be distributed online if the investor is of required minimum distribution age or older and invested in Class C shares.

[3] Can send proceeds to the eligible institution. Cannot distribute more than $125,000. Can deposit to the bank only if the bank account (ACH option) has been linked and hasn't been modified in the last 10 calendar days. Can send proceeds via check only if the address hasn't been modified in the last 10 calendar days.

[4] Cannot withdraw more than $125,000. If Capital Group is calculating cost basis on the shares, the potential contingent deferred sales charge and estimated gain or loss can also be calculated. Can deposit to the bank only if the bank account (ACH option) has been linked and hasn't been modified in the last 10 calendar days. Can send proceeds via check only if the address hasn't been modified in the last 10 calendar days.

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