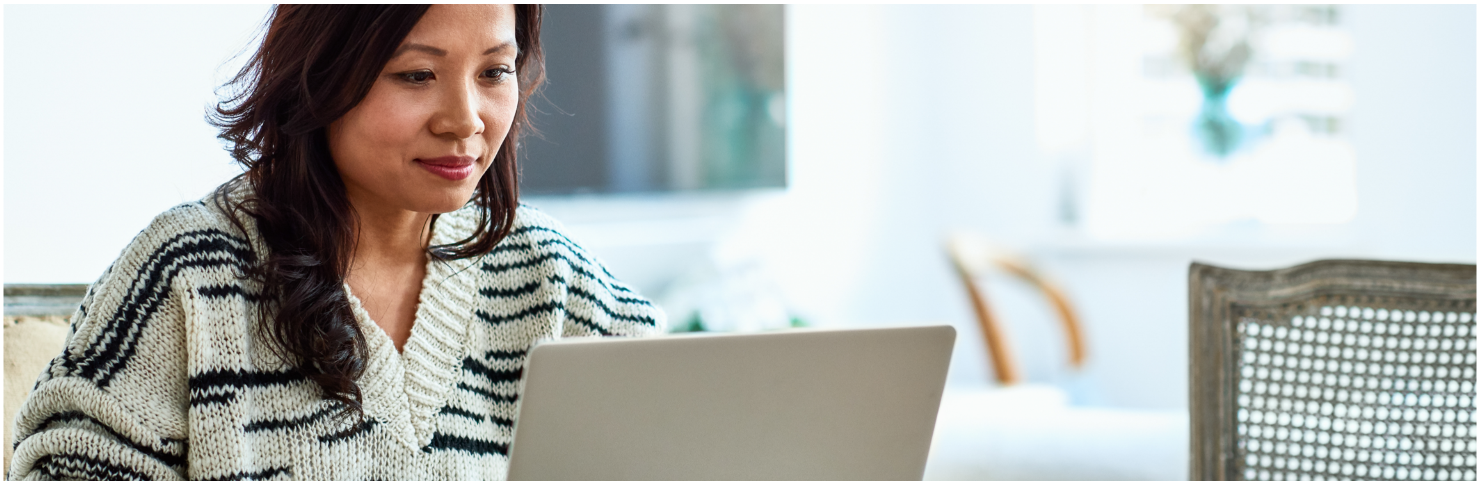


How to enroll in your retirement plan

You can enroll in your plan online or through our mobile app. Here's a step-by-step enrollment guide for your plan, provided by Capital Group, home of American Funds.

Watch the enrollment video

Scan the QR code to see our two-minute how-to video.

Questions on your mind?

Contact your employer or call us at **(800) 204-3731**

Ongoing support for your retirement journey

Customer service

Call **(800) 204-3731**
Available Monday through Friday 8:00 a.m. to 10:00 p.m. ET, and Saturday 9:00 a.m. to 5:30 p.m. ET

Participant website

capitalgroup.com/participant/planpremier

Mobile app

App Store or Google Play: **Capital Group PlanPremier401k**

Enroll online

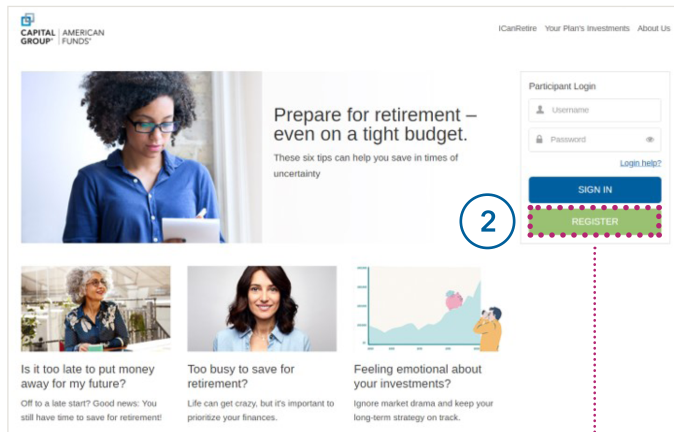
Register your account

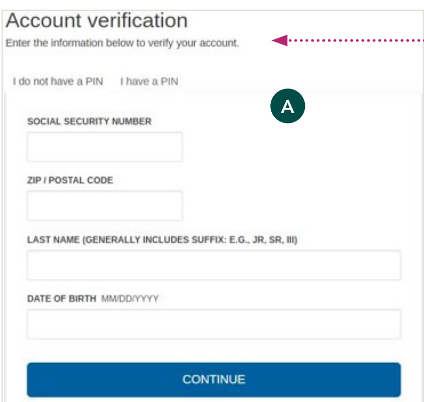
1 Access your plan's enrollment education site

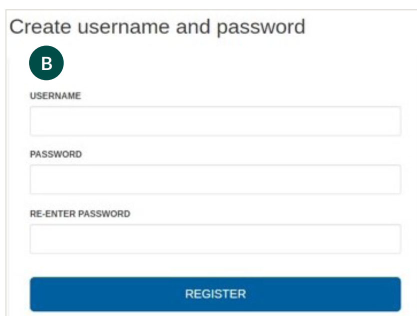
Use the URL provided by your employer to access your plan's enrollment site and review plan information, features and investment options. When you're ready, click **Enroll**. Alternatively, you can go directly to the participant website at capitalgroup.com/participant/planpremier to begin the enrollment process.

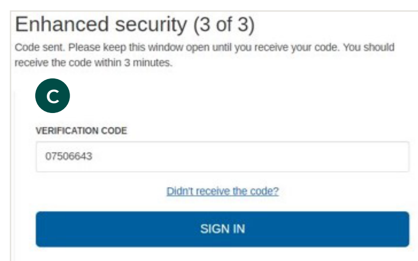
2 At the account login screen, click the green REGISTER button to register your online account

- **A** Enter the requested personal information to verify your account. If you received a **PIN**, select **I have a PIN** to enter the number.
- **B** Set up your username and password and click **REGISTER**.
- **C** Enter your contact information for a verification code and click **SEND ME A CODE**. Enter the passcode you receive and click **SIGN IN**.







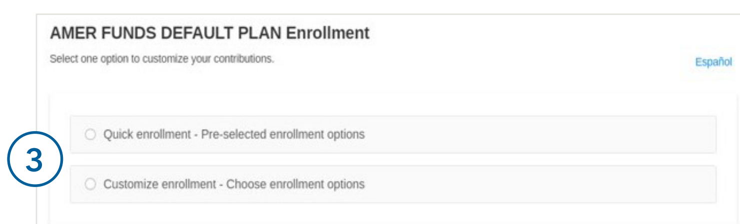


3 Select your enrollment method

Depending on your plan's features, you may have two options for enrollment.

- **A** Select **Quick enrollment,** if offered by your plan, for a faster enrollment process using the default contribution rate and investment option selected by your employer.
- **B** **Customize enrollment** allows you to select your contribution rate and type and select your own investment options.

  See the following pages for instructions on both methods.



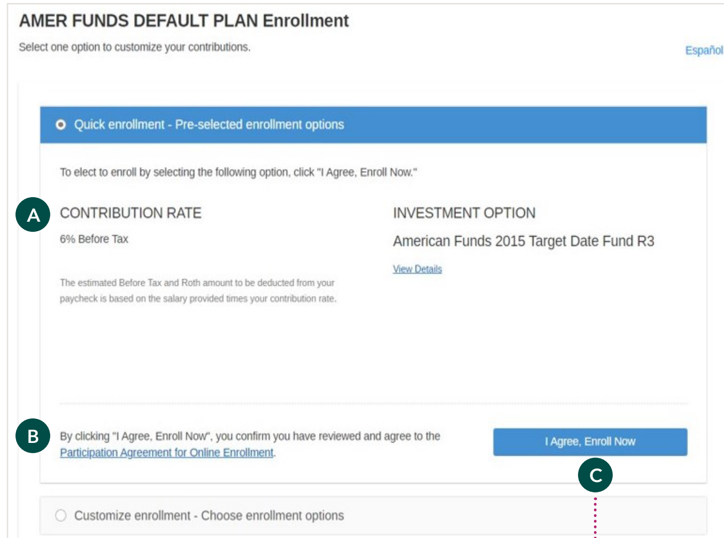
Enroll online

Complete your enrollment

Option 1: Quick enrollment

If your plan offers **Quick enrollment**, you can select that method for a simple and fast enrollment process and follow the steps below to accept your plan's default contribution rate and investment option.

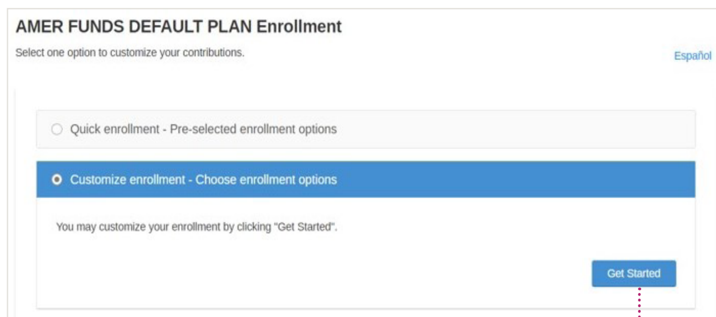
- **A** Review the default contribution rate and investment option designated by your employer.
- **B** Click **Participation Agreement for Online Enrollment** to read the agreement.
- **C** Click **I Agree, Enroll Now** to enroll. See Step 3 on the following page for the confirmation screen and instructions on adding a beneficiary.



Proceed to Step 3 on the following page

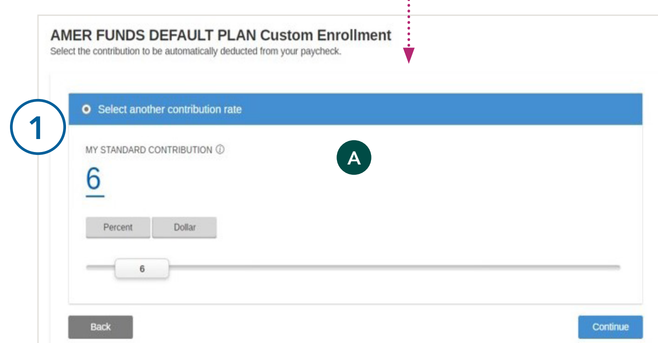
Option 2: Customize enrollment

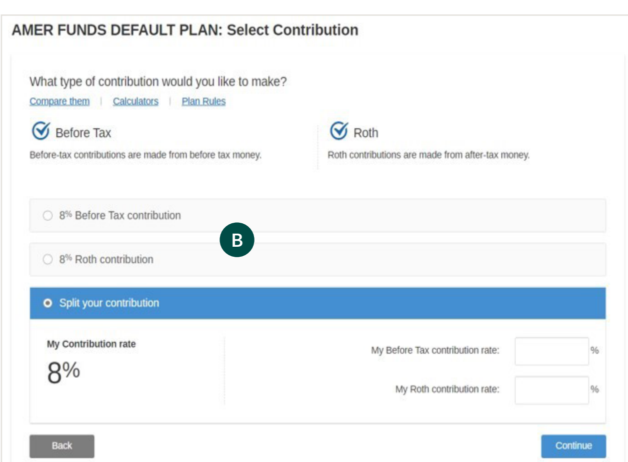
Customize enrollment allows you to set your contribution rate and select your own mix of investments. Click **Get Started** to begin and follow the steps below and on the next page.

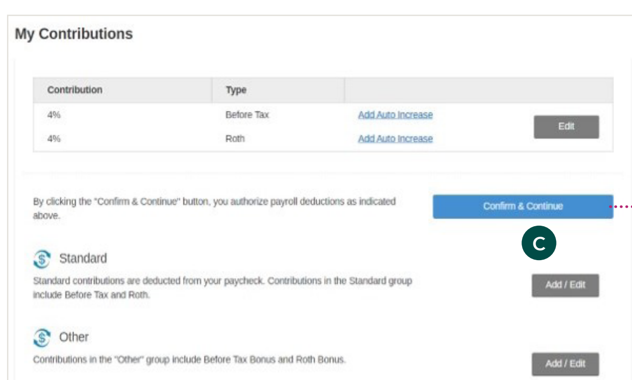


1 Select your contribution rate

- **A** Set your overall contribution rate.
- **B** Indicate whether you want to make before-tax or after-tax (Roth) contributions (if allowed by your plan), or a combination of both.
- **C** Review your contribution selections and click **Confirm & Continue.**







Continued on the following page

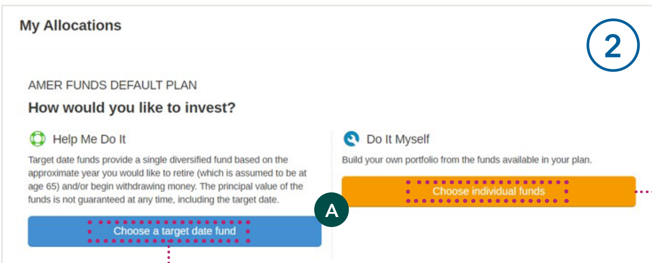
Enroll online

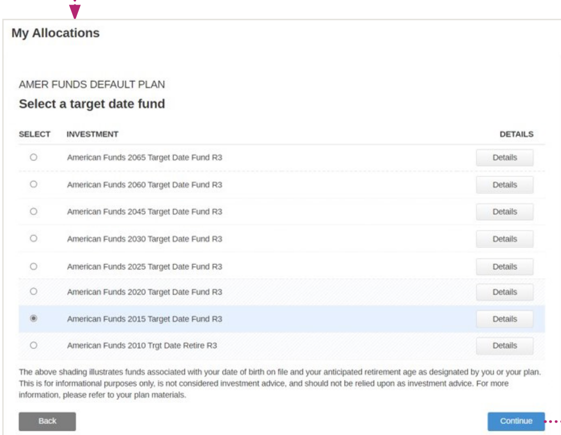
Complete your enrollment (continued)

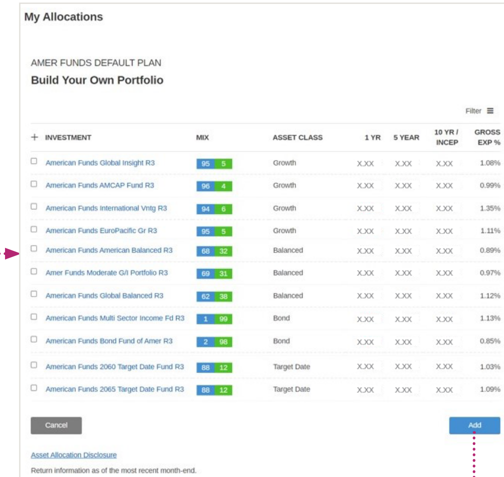
2 Next, select your investments

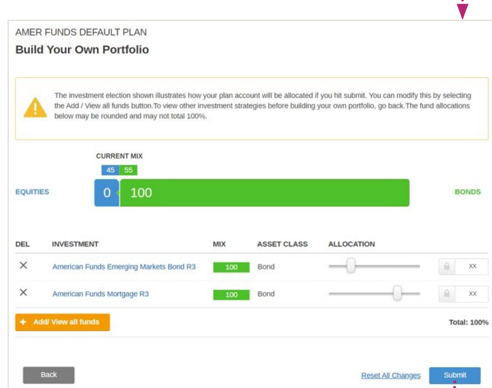
A Select whether you want to choose a target date fund or a mix of individual funds. Then make and confirm your selection(s).

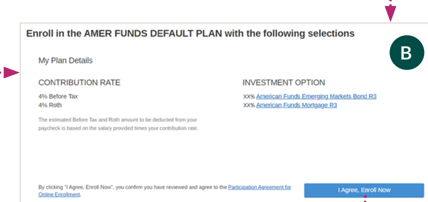
B On the final screen, you can view your selections and click **I Agree, Enroll Now**.









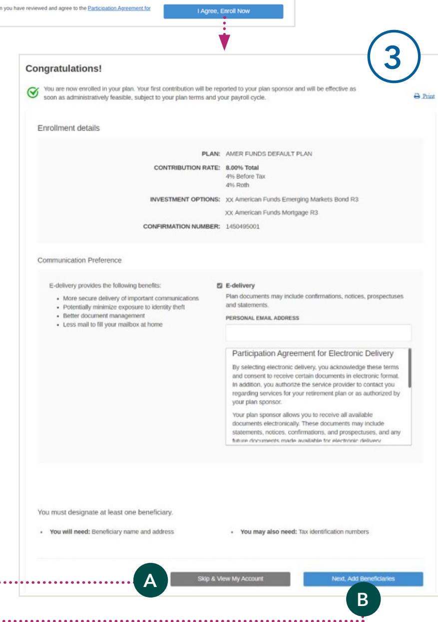


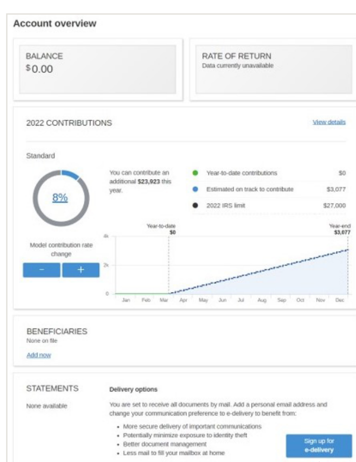
3 You're enrolled!

A Click **Skip & View My Account** to proceed to the home page, or

B If allowed by your plan, click **Next, Add Beneficiaries** to name a beneficiary.

B1 You must designate at least one primary beneficiary. When you're done, click **Home** to see your account home page.





Enroll through our mobile app

You can also enroll using your phone or tablet

Download the Capital Group PlanPremier401k app from the App Store or Google Play

1. Log in to your account. If you haven't logged in previously, select **Register now**. You'll be prompted to verify your identity and set up your username and password. You'll then receive a verification code to enter for enhanced security.

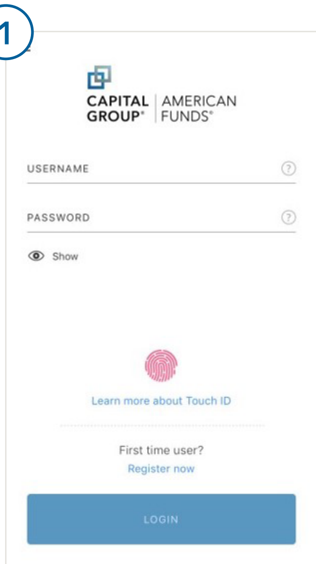
2. If you accept the default contribution rate and investment option as designated by your employer, select **I AGREE, ENROLL NOW**. If not, see the **Change your contributions** section below and the **Change your investments** section on the following page.

Scan the QR codes below to download the mobile app

Download on the App Store

GET IT ON Google Play

1



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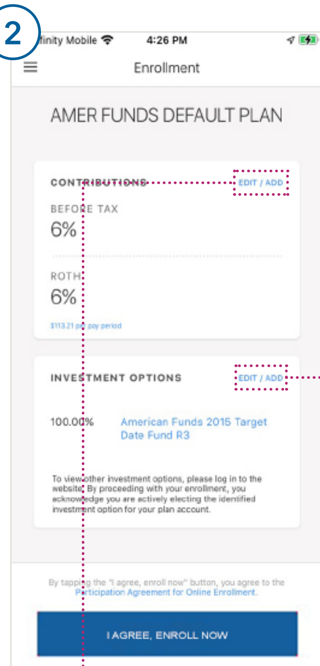


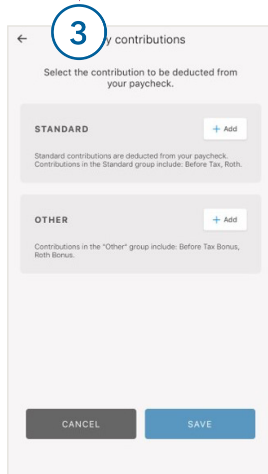
Refer to Step 4 on the following page

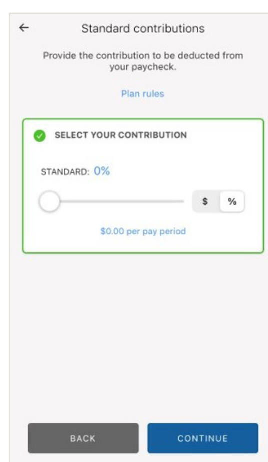
3. ## Change your contributions

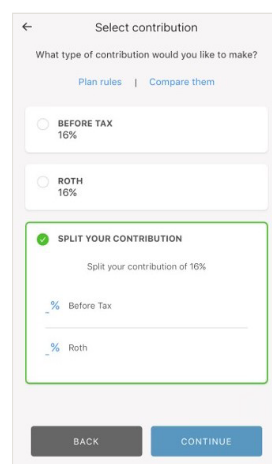
If you want to change your contributions, select **EDIT/ADD** next to **CONTRIBUTIONS** on the enrollment screen.

You'll set your overall contribution rate and contribution type(s).

When you're done, you'll return to the enrollment screen to confirm your choices.





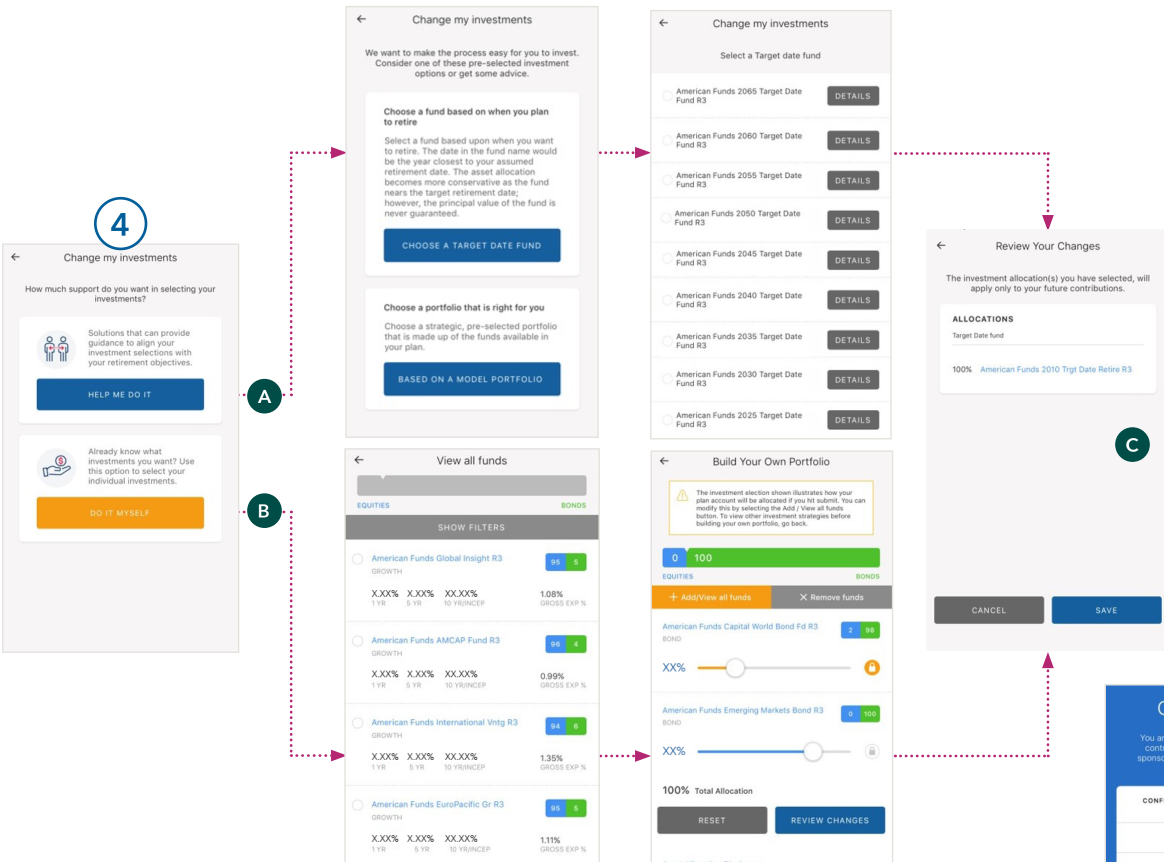


Enroll through our mobile app (continued)

4 Change your investments

If you want to select investments from the plan's investment menu, select **EDIT/ADD** next to **INVESTMENT OPTIONS** on the enrollment screen.

- **A** Select **HELP ME DO IT** to choose a target date fund, or
- **B** **DO IT MYSELF** to choose from a mix of individual funds.
- **C** When you're done, review your selections and click SAVE to return to the enrollment screen.



5 Finish enrollment

After changing your contribution rate and/or selecting your investments, if applicable, you will return to the enrollment screen (shown in Step 2 on the previous page). Click **I AGREE, ENROLL NOW** to finish enrollment.

Once you've enrolled, you can review your contributions, add beneficiaries, change your communication preferences or view your account.

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