



Looking to **accelerate your success** with a 401(k) solution designed to help your clients move forward?

Sponsoring a retirement plan becomes simplified with RecordkeeperDirect Integrated. Combining the extensive capabilities of four providers, we've integrated retirement plan services into a seamless experience. You and your business could benefit from important features and flexibility that streamline operations, including:

- **Plan reviews and employee education** by Edward Jones
- **Recordkeeping and investments** by Capital Group, home of American Funds
- **Plan administration** by AMP*, operating as a plan fiduciary†
- **Investment recommendations and monitoring** by Wilshire, operating as an investment fiduciary†



Wilshire

RecordkeeperDirect Integrated

Right-touch support for you and your plan sponsor clients

Integrated suite of investments, recordkeeping, administration and fiduciary services

Retirement-focused target date series from Capital Group's suite of American Funds

Easy enrollment and engaging education for participants

Great alternative to mandatory state-sponsored retirement plans

Tax credits for startup plans – see [eligibility requirements](#)

Build your retirement plan practice while exceeding the expectations of small business clients

RecordkeeperDirect Integrated seeks to connect excellence in strategic investments, recordkeeping, fiduciary support, and performance monitoring for a carefully crafted plan experience that are designed to be rewarding for your clients, plan participants and your practice alike.

A simplified retirement plan solution

RecordkeeperDirect Integrated was specifically designed to meet the needs of small business clients by making it easy to offer a retirement plan to their employees – one that brings together the essential components of a quality plan into a single, convenient, ready-made solution.

Get started with a client-ready proposal

We'll help you build the right retirement plan for your client. Call **(888) 777-1579** for your client-ready proposal.

* Third-party administrator (TPA) shown is for illustrative purposes only. The RecordkeeperDirect Integrated plan solution offers plan sponsors the choice of three TPA options: (1) Aboon, (2) AMP and (3) MAP Retirement. You can discuss each of these options with your plan sponsor clients or prospective clients.

† Plan sponsors retain certain fiduciary responsibilities that cannot be delegated to Aboon or Wilshire, including the selection and monitoring of service providers. Plan sponsors are also responsible for reviewing all service provider agreements.

How can we help you?

We're dedicated to helping you build the right retirement plan for all of your clients. Contact us today for more information.

 Visit capitalgroup.com or call (888) 777-1579.

About Capital Group

Capital Group is dedicated to optimizing the overall retirement plan experience for better participant long-term outcomes. Among retirement plan advisors who manage under \$50 million in plan assets, Capital Group | American Funds was the plan provider selected most often with the following attributes important to financial professionals¹:

☒ Reliable

☒ Easy to do business with

☒ A company I trust



Dedicated to investors

More than **2.6 million** plan participants count on us to pursue their retirement goals.²



A trusted recordkeeper

Over **68,000** businesses and their employees rely on our retirement plan recordkeeping services.²



A top asset manager

With more than **\$2.5 trillion** assets under management, Capital Group is one of the world's largest investment management organizations.²

¹ Escalent, Cogent Syndicated, Retirement Plan Advisor Trends™, October 2024. Methodology: 411 respondents participated in a web survey conducted September 9-17, 2024. For "Ownership" of Core Brand Attributes – Tier 1, among 195 financial advisors managing less than \$50 million in defined contribution (DC) assets under management (AUM), Capital Group | American Funds was selected most often in response to the question, "Which – if any – of these DC plan providers are described by this statement ... 'Is a company I trust,' 'is reliable' and 'easy for advisors to do business with?'"

² As of 12/31/24. Participants in Capital Group 401(k), 403(b), SEP IRA and SIMPLE IRA plans. Number of businesses in proprietary recordkeeping solutions.

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Investors should carefully consider investment objectives, risks, charges and expenses. This and other important information is contained in the fund prospectuses and summary prospectuses, which can be obtained from a financial professional, and should be read carefully before investing.

Although the target date portfolios are managed for investors on a projected retirement date time frame, the allocation strategy does not guarantee that investors' retirement goals will be met. Investment professionals manage the portfolio, moving it from a more growth-oriented strategy to a more income-oriented focus as the target date gets closer. The target date is the year that corresponds roughly to the year in which an investor is assumed to retire and begin taking withdrawals. Investment professionals continue to manage each portfolio for approximately 30 years after it reaches its target date.

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