Accessing Client Accounts –
Financial professional

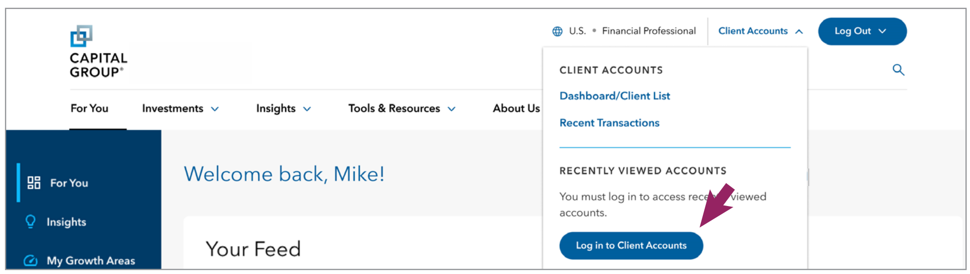
How financial professionals access Client Accounts

When you log in, you'll be prompted to link your Vision ID and password to your Capital Ideas Pro™ login, providing a seamless login process with 2-step verification.

Before you get started, you'll need to:

- Be registered on our website with a **Capital Ideas Pro** user name and password
  - If you don't already have a Capital Ideas Pro user name and password, register now at capitalgroup.com/CIPro
- Have your login credentials for the DST Vision® website handy
  - If you don't already have Vision credentials, visit dstvision.com and select **NEW USER?**
  - DST Vision will send a confirmation email within 1 to 3 business days

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
3. Select your role



4. Enter your mobile phone number to set up 2-step verification
   - We will never ask you for your passcodes. For your security, don't share passcodes with anyone.
5. Enter your Vision ID and password when you're redirected to the DST Vision website
   - You'll also be prompted to **verify your identity** by receiving a one-time passcode
   - This process can take a few minutes, so be sure to **keep your browser open**
   - **IMPORTANT:** Vision credentials **should not be shared** with anyone. Assistants must link their Capital Ideas Pro credentials to their own affiliate Vision ID. If they link their Capital Ideas Pro credentials to your Vision ID, it will prevent you from linking your own Vision ID.

Your **Capital Ideas Pro user name and password** will now serve as your login credentials for Client Accounts. In the future, when you log in, you'll only need to enter your password and a one-time passcode. Occasionally, you may also be prompted to enter your user name for security purposes.

Tip: If you have more than one Vision ID, you must link them all to your Capital Ideas Pro login. Once logged in, open the **Vision ID** menu and select **Manage Vision IDs** to link additional IDs.

For a step-by-step demonstration of this process, visit capitalgroup.com/clientaccountsvideo or scan the QR code.

Review the other side for instructions for assistants.

Accessing Client Accounts –
Assistant

CAPITAL GROUP®

How assistants access Client Accounts

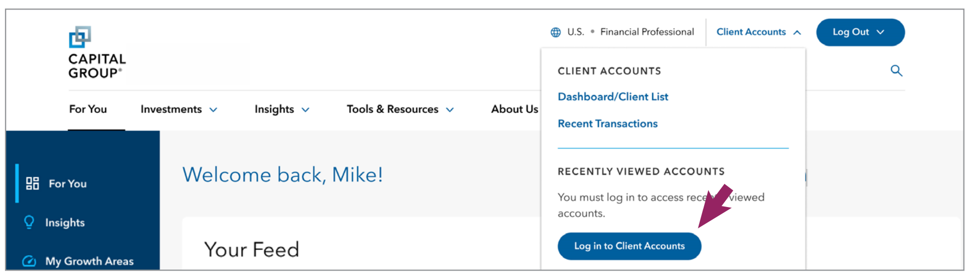
When you log in, you'll be prompted to link your Affiliate Vision ID and password to your Capital Ideas Pro™ login, providing a seamless login process with 2-step verification.

Before you get started, you'll need to:

☑ Be registered on our website with a **Capital Ideas Pro** user name and password
- If you don't already have a Capital Ideas Pro user name and password, register now at capitalgroup.com/CIPro with the role of **Administrative Staff**

☑ Have your login credentials for the DST Vision® website handy
- You **should not share** Vision credentials with your financial professional; you need an **Affiliate Vision ID**. Affiliate Vision IDs have the same level of access as the financial professional.
- Each financial professional you support will need to create an Affiliate Vision ID for you by **logging in to DST Vision**, hovering over the **Administrative** drop-down menu and selecting **Enroll Affiliate IDs**
- DST Vision will send a confirmation email within 1 to 3 business days

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
3. Select your role as **Administrative Staff**



4. Enter your mobile phone number to set up 2-step verification
   - We will never ask you for your passcodes. For your security, don't share passcodes with anyone.
5. Enter your Affiliate Vision ID and password when you're redirected to the DST Vision website
   - You'll also be prompted to **verify your identity** by receiving a one-time passcode
   - This process can take a few minutes, so be sure to **keep your browser open**
   - **IMPORTANT:** You must link your Capital Ideas Pro credentials to your own Affiliate Vision ID. If you link your Capital Ideas Pro credentials to your financial professional's Vision ID, it will prevent your financial professional from linking their own Vision ID.

Your **Capital Ideas Pro user name and password** will now serve as your login credentials for Client Accounts. In the future, when you log in, you'll only need to enter your password and a one-time passcode. Occasionally, you may also be prompted to enter your user name for security purposes.

Tip: If you support more than one financial professional and have more than one Affiliate Vision ID, you must link them all to your Capital Ideas Pro login. Once logged in, open the **Vision ID** menu and select **Manage Vision IDs** to link additional IDs.

For a step-by-step demonstration of this process, visit capitalgroup.com/clientaccountsvideo or scan the QR code.

Review the other side for instructions for financial professionals.