

Leverage Capital Group's experience and scale with custom models

How do I select a portfolio strategist?

Leverage the knowledge of experienced investment professionals to help investors achieve their financial goals. Seek out portfolio strategists with deep experience and familiarity with financial markets and investment strategies who can design, manage and monitor portfolios aligned with real-life goals. Add us to your team.

Who are the people managing and monitoring the strategies?

The Capital Group custom models investment team, which has an average of 30 years of investment industry experience, build and oversee the custom model portfolios.

Investment industry experience | Years with Capital Group

Portfolio Solutions Committee Portfolio Managers

 Michelle Black Solutions 31 24	 Brittain Ezzes Equities 28 4	 Samir Mathur Solutions 33 13	 Damien McCann Fixed income 26 26	 Wesley Phoa Solutions 33 27	 John Queen Fixed income 36 24	 Andrew Suzman Equities 32 32
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Portfolio Solutions Managers

 Steve Fox Portfolio Solutions Manager 31 10	 Victoria Quach Portfolio Solutions Manager 18 8
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The investment team is supported by the Capital Solutions Group, a think tank composed of investment professionals and operational partners with a wealth of knowledge and experience on asset allocation matters. These two groups collaborate on research and recommendations, and decisions and feedback are shared in the pursuit of effective solutions for our clients.

Portfolio Solutions Managers implement customization preferences while seeking to reflect objective-specific risk and return profiles. Years of experience as of December 31, 2025. Investment professional responsibilities may have changed since that date.

Investments are not FDIC-insured, nor are they deposits of or guaranteed by a bank or any other entity, so they may lose value.

Advisory services offered through Capital Research and Management Company (CRMC) and its RIA affiliates.

Custom Models with Capital Group

What makes the strategist different?

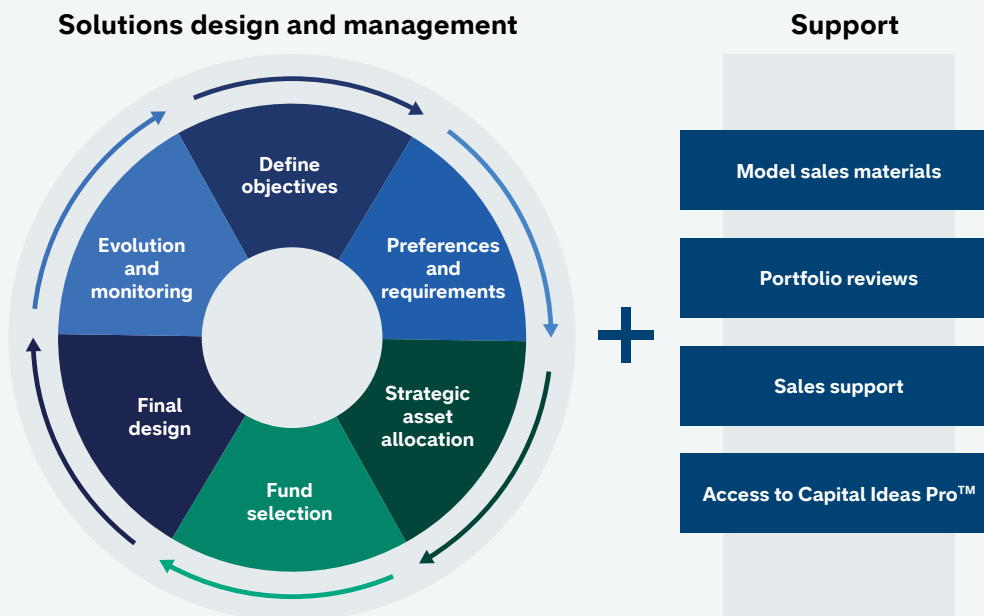
Capital Group employs two layers of active management in our custom models. The first layer is bottom-up security selection by portfolio managers in each of the actively managed underlying Capital Group funds. The second layer is the construction and oversight of the model portfolios by the custom models investment team.

Why custom models?

A custom model gives you the freedom and flexibility to provide your clients with a portfolio designed to meet their needs.

Using an objective-based investment philosophy focused on achieving investor goals, we leverage Capital Group's scale and experience to design models to meet your unique needs. We work with you to determine your portfolio preferences for: vehicle choice, third-party provider choice, weighted-average expense ratio targets, active/passive allocation, strategy focus and flexibility.

These are the steps we take in our investment process, as well as the support you can expect when you partner with Capital Group:



Discover how custom models can work for your practice. Contact your Capital Group sales professional today.

Model portfolios are provided to financial intermediaries who may or may not recommend them to clients. The portfolios consist of an allocation of funds for investors to consider and are not intended to be investment recommendations. The portfolios are asset allocations designed for individuals with different time horizons, investment objectives and risk profiles. Allocations may change and may not achieve investment objectives. If a cash allocation is not reflected in a model, the intermediary may choose to add one. Capital Group does not have investment discretion or authority over investment allocations in client accounts. Rebalancing approaches may differ depending on where the account is held. Investors should talk to their financial professional for information on other investment alternatives that may be available. In making investment decisions, investors should consider their other assets, income and investments.

Model portfolios are subject to the risks associated with the underlying funds in the model portfolio. Investors should carefully consider investment objectives, risks, fees and expenses of the funds in the model portfolio, which are contained in the fund prospectuses. Investing outside the United States involves risks, such as currency fluctuations, periods of illiquidity and price volatility. These risks may be heightened in connection with investments in developing countries. Smaller company stocks entail additional risks, and they can fluctuate in price more than larger company stocks. The return of principal for bonds and for funds with significant underlying bond holdings is not guaranteed. Fund shares are subject to the same interest rate, inflation and credit risks associated with the underlying bond holdings. Lower rated bonds are subject to greater fluctuations in value and risk of loss of income and principal than higher rated bonds. Investments in mortgage-related securities involve additional risks, such as prepayment risk. The use of derivatives involves a variety of risks, which may be different from, or greater than, the risks associated with investing in traditional securities, such as stocks and bonds. Income from municipal bonds may be subject to state or local income taxes and/or the federal alternative minimum tax. Certain other income, as well as capital gain distributions, may be taxable. A non-diversified fund has the ability to invest a larger percentage of assets in the securities of a smaller number of issuers than a diversified fund. As a result, poor results by a single issuer could adversely affect fund results more than if the fund were invested in a larger number of issuers. See the applicable prospectus for details.

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