CAPITAL GROUP®

Notice delivery

PlanPremier® plans



Simplify your **retirement plan notice** process

No more endless printing or stuffing envelopes. Notice delivery makes it easy to send disclosure documents and notices to participants with two service options: have us create and deliver notices automatically or submit notices for us to mail to participants.

It's one more way that Capital Group helps you fulfill your administrative responsibilities with **PlanPremier**.

Two options for notice delivery

Option 1: "Create AND deliver notices for me"

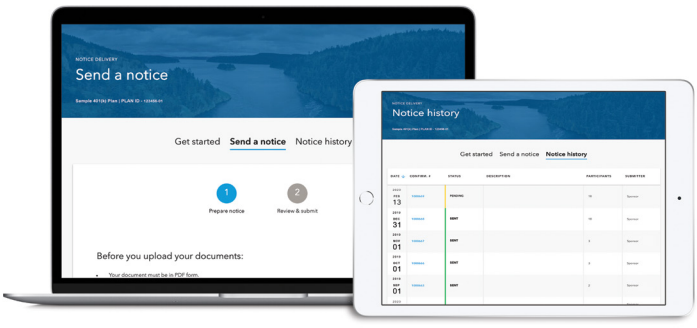
- You can opt to have a range of notices **automatically generated** and customized for your plan.
- Notices can be delivered **via email for free** to participants with valid email addresses on file. For participants without valid email addresses, notices are mailed for **a flat fee of $2.50 per mailed notice**.*
- Documents are automatically posted to both the participant and plan sponsor websites.

Option 2: "Mail notices for me"

- You can create and customize **any notice** and have us deliver it for you.
- Notices are mailed for **a flat fee of $2.00 per mailed notice** for each document sent.
- A detailed history of past notices is available on the plan sponsor website.

Costs for both services are included in the plan's quarterly recordkeeping invoice.

* There is no fee for automatic enrollment notices sent using the automated notice delivery service, regardless of delivery method. Unenrolled employees who are eligible but not participating receive an annual reminder of the right to enroll instead of the annual notices elected, pursuant to SECURE 2.0 Act.



See the following page for a step-by-step overview

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

Option one

Create and deliver notices for me

Simplify your plan administration by having us automatically customize and deliver plan notices, using plan and participant information in the Capital Group recordkeeping system. This option also saves you money by delivering notices electronically at no charge to participants with valid email addresses on file. Documents are automatically posted to both the participant and plan sponsor websites.

Get started	Notices delivered	Review history
Sign up for customized notice and delivery services by submitting a service request through the plan management portal on the plan sponsor website. Ensure employees' addresses and emails are up-to-date.	Notices will be automatically generated based on plan data and provisions. We'll email or mail notices using participant addresses from the recordkeeping system.	You and your participants can view notices on the plan sponsor and participant websites.

Note: Automated notice delivery is available for automatic enrollment, qualified default investment alternative and participant fee disclosure notices. Automatic delivery of safe harbor notices, summary plan descriptions, summary of material modifications and summary annual reports are currently only available for PlanPremier-Bundled plans. For other notice types, you can have us mail the notices using the instructions below.

In lieu of the annual notices elected, unenrolled participants (employees who are eligible but not participating) will receive a single annual reminder notice of their eligibility to participate.

To enable this service, contact your TPA or call your Capital Group representative at **(877) 872-5159**.

Option two

Mail notices for me

You can also customize your own notices and have us deliver them for you, by providing us with the notice and a participant list. You can send any notice using this method. Access this service by logging into the plan sponsor website, selecting the **Administration** tab and clicking **Plan Notices.**

Get started	Send a notice	Review history
Using the formatting requirements on our website, prepare your notice for upload. Then download our template to create a participant list.	Upload your plan notice and participant list. Then review and submit your notice for delivery. We'll mail your plan notice within four business days.	Check the status of your notice and see when it's been sent. You can also view a detailed history of your past notices in one convenient place.

Note: Notices that you submit to be mailed cannot be delivered electronically and are not posted automatically to the participant website.



Learn more

Visit the plan sponsor website to learn more or contact your Capital Group representative.

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Capital Client Group, Inc.

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