CAPITAL GROUP®

American Funds®

American Funds Model Portfolios at LPL Financial

A model portfolio for every investor

Built with six Morningstar "Thrilling 33" funds*

American Funds Model Portfolios at LPL Financial are monitored by our Portfolio Solutions Committee (PSC). The models represent this team's best thinking on how to construct portfolios that pursue a wide variety of client goals.

Explore American Funds growth model portfolios available on MWP

Underlying fund (Ticker, F-2 for mutual funds) allocations as of July 31, 2026

American Funds Growth



GROWTH	
The Growth Fund of America® (GFFFX)	21%
New Perspective Fund® (ANWFX)	15%
SMALLCAP World Fund® (SMCFX)	15%
AMCAP Fund® (AMCFX)	10%
The New Economy Fund® (NEFFX)	10%
The New World Fund® (NFFFX)	4%
GROWTH AND INCOME	
Fundamental Investors® (FINFX)	10%
The Investment Company of America® (ICAFX)	10%
Washington Mutual Investors Fund® (WMFFX)	5%

American Funds Global Growth



GROWTH	
New Perspective Fund (ANWFX)	20%
SMALLCAP World Fund (SMCFX)	15%
The Growth Fund of America (GFFFX)	13%
EUPAC Fund™ (AEPFX)	10%
The New Economy Fund (NEFFX)	10%
The New World Fund (NFFFX)	10%
American Funds Global Insight Fund® (AGVGX)	5%
GROWTH AND INCOME	
Capital World Growth and Income Fund® (WGIFX)	17%

American Funds Moderate Growth



GROWTH	
The Growth Fund of America (GFFFX)	15%
SMALLCAP World Fund (SMCFX)	10%
AMCAP Fund (AMCFX)	5%
American Funds Global Insight Fund (AGVGX)	5%
The New World Fund (NFFFX)	4%
GROWTH AND INCOME	
Capital World Growth and Income Fund (WGIFX)	15%
The Investment Company of America (ICAFX)	8%
Fundamental Investors (FINFX)	5%
Washington Mutual Investors Fund (WMFFX)	5%
BALANCED	
American Balanced Fund® (AMBFX)	13%
American Funds Global Balanced Fund® (GBLFX)	13%
BOND	
American Funds Emerging Markets Bond Fund® (EBNFX)	2%

Footnote/Important information:

*Source: Morningstar, "The Thrilling 33" by Russel Kinnel, August 13, 2025. Morningstar's screening took into consideration expense ratios, manager ownership, returns over manager's tenure and Morningstar Risk, Medalist and Parent ratings. The universe was limited to share classes accessible to individual investors with a minimum investment no greater than $50,000, did not include funds of funds and must be rated by Morningstar analysts. Class A shares were evaluated for American Funds. Not all funds on the list are in each model. Underlying funds may change over time. Where applicable, American Funds/Capital Group models may utilize Class F-2 or F-3 shares of the underlying American Funds mutual funds. The Thrilling 33 list includes American Balanced Fund, American Mutual Fund, Capital Income Builder, The Income Fund of America, The New Economy Fund and New Perspective Fund.
Visit Morningstar's website for more details.

Data based on the target allocations of the underlying funds.

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

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

Discover American Funds growth and income model portfolios available on MWP

Underlying fund (Ticker, F-2 for mutual funds) allocations as of July 31, 2026

American Funds Conservative Growth and Income



GROWTH AND INCOME	
Washington Mutual Investors Fund (WMFFX)	10%
Capital World Growth and Income Fund (WGIFX)	9%
American Mutual Fund® (AMRFX)	7%
EQUITY INCOME	
Capital Income Builder® (CAIFX)	15%
The Income Fund of America® (AMEFX)	15%
BOND	
American Funds Multi-Sector Income Fund® (MIAYX)	15%
The Bond Fund of America® (ABNFX)	15%
American High-Income Trust® (AHIFX)	10%
American Funds Emerging Markets Bond Fund (EBNFX)	4%

American Funds Growth and Income



GROWTH	
SMALLCAP World Fund (SMCFX)	8%
American Funds Global Insight Fund (AGVGX)	5%
The Growth Fund of America (GFFFX)	5%
The New World Fund (NFFFX)	3%
GROWTH AND INCOME	
Capital World Growth and Income Fund (WGIFX)	15%
The Investment Company of America (ICAFX)	12%
Washington Mutual Investors Fund (WMFFX)	10%
Fundamental Investors (FINFX)	5%
EQUITY INCOME	
Capital Income Builder (CAIFX)	10%
BALANCED	
American Balanced Fund (AMBFX)	10%
BOND	
American Funds Multi-Sector Income Fund (MIAYX)	5%
American Funds Strategic Bond Fund (ANBFX)	5%
The Bond Fund of America (ABNFX)	5%
American Funds Emerging Markets Bond Fund (EBNFX)	2%

American Funds Moderate Growth and Income



GROWTH	
New Perspective Fund (ANWFX)	5%
SMALLCAP World Fund (SMCFX)	5%
The Growth Fund of America (GFFFX)	3%
The New World Fund (NFFFX)	2%
GROWTH AND INCOME	
Washington Mutual Investors Fund (WMFFX)	12%
Capital World Growth and Income Fund (WGIFX)	10%
EQUITY INCOME	
The Income Fund of America (AMEFX)	10%
BALANCED	
American Balanced Fund (AMBFX)	21%
American Funds Global Balanced Fund (GBLFX)	15%
BOND	
American Funds Multi-Sector Income Fund (MIAYX)	5%
American Funds Strategic Bond Fund (ANBFX)	5%
The Bond Fund of America (ABNFX)	5%
American Funds Emerging Markets Bond Fund (EBNFX)	2%

American Funds Tax-Aware Conservative Growth and Income*



GROWTH	
Capital Group Global Equity ETF (CGUS)	9%
GROWTH AND INCOME	
Capital Group Dividend Growers ETF (CGDG)	15%
Capital Group Dividend Value ETF (CGDV)	13%
Capital Group Conservative Equity ETF (CGCV)	5%
Capital Group Core Equity ETF (CGUS)	5%
Capital Group International Core Equity ETF (IGFFX)	2%
TAX–EXEMPT BOND	
Capital Group Municipal High-Income ETF (CGHM)	25%
Capital Group Municipal Income ETF (CGMU)	22%
Capital Group Short Duration Municipal Income ETF (CGSM)	4%

Footnote/Important information:

*Effective September 30, 2026, American Funds Tax-Aware Conservative Growth and Income Model Portfolio will be renamed to Capital Group ETF Tax-Aware Conservative Growth and Income Model.

Data based on the target allocations of the underlying funds.

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. Visit capitalgroup.com for current allocations.

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 bond funds 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 nondiversified 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.

Learn more about American Funds income model portfolios available on MWP

Underlying fund (Ticker, F-2 for mutual funds) allocations as of July 31, 2026

American Funds Retirement Income — Enhanced†



GROWTH	
AMCAP Fund (AMCFX)	5%
GROWTH AND INCOME	
Capital World Growth and Income Fund (WGIFX)	6%
American Mutual Fund (AMRFX)	5%
International Growth and Income Fund (AMRFX)	4%
EQUITY INCOME	
Capital Income Builder (CAIFX)	20%
The Income Fund of America (AMEFX)	16%
BALANCED	
American Balanced Fund (AMBFX)	20%
American Funds Global Balanced Fund (GBLFX)	5%
BOND	
American Funds Multi-Sector Income Fund (MIAYX)	9%
American High-Income Trust (AHIFX)	5%
The Bond Fund of America (ABNFX)	5%

American Funds Retirement Income — Moderate†



GROWTH AND INCOME	
Capital World Growth and Income Fund (WGIFX)	7%
American Mutual Fund (AMRFX)	5%
EQUITY INCOME	
The Income Fund of America (AMEFX)	20%
Capital Income Builder (CAIFX)	18%
BALANCED	
American Balanced Fund (AMBFX)	15%
American Funds Global Balanced Fund (GBLFX)	5%
BOND	
American Funds Multi-Sector Income Fund (MIAYX)	9%
The Bond Fund of America (ABNFX)	8%
U.S. Government Securities Fund® (GVTFX)	7%
American Funds Strategic Bond Fund (ANBFX)	6%

American Funds Retirement Income — Conservative†



GROWTH AND INCOME	
American Mutual Fund (AMRFX)	7%
EQUITY INCOME	
Capital Income Builder (CAIFX)	18%
The Income Fund of America (AMEFX)	15%
BALANCED	
American Balanced Fund (AMBFX)	8%
American Funds Global Balanced Fund (GBLFX)	4%
BOND	
The Bond Fund of America (ABNFX)	15%
Intermediate Bond Fund of America® (IBAFX)	10%
American Funds Multi-Sector Income Fund (MIAYX)	8%
American Funds Inflation Linked Bond Fund® (BFIGX)	5%
American Funds Strategic Bond Fund (ANBFX)	5%
U.S. Government Securities Fund (GVTFX)	5%

Footnote/Important informaation:

†Also known as American Funds Retirement Distribution Income Model - Enhanced, American Funds Retirement Distribution Income Model - Moderate, and American Funds Retirement Distribution Income Model - Conservative.

Data based on the target allocations of the underlying funds.

LPL Financial LLC ("LPL") offers a variety of investment advisory programs through its own network of financial advisors, LPL's affiliate LPL Enterprise, LLC, and third-party registered investment advisers. Please refer to your investment advisory agreement to understand how you are accessing an LPL Program. In the LPL Model Wealth Portfolios (MWP) Program, LPL's Overlay Portfolio Management Group is responsible for trading and rebalancing the client's account based on the selected model portfolio(s). Client performance results in an LPL account will vary, in part due to the Overlay Portfolio Management Group's role in implementing the model. LPL and the third-party model provider are not affiliates of each other and make no representation with respect to each other.

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Investors should consider the investment objectives, risks, charges, and expenses of the investment company carefully before investing. The prospectus, and if available, the summary prospectus contains this and other information about the investment company. You can obtain a prospectus from the fund's website or from your financial advisor. Read carefully before investing.

LPL Financial and Capital Group are not affiliates of each other and make no representation with respect to each other.

Discover American Funds tax-aware model portfolios available on MWP

Underlying exchange-traded funds allocations as of July 31, 2026

American Funds Tax-Aware Growth and Income Model Portfolio*



GROWTH	
Capital Group Global Equity ETF (CGGE)	15%
Capital Group Global Growth Equity ETF (CGGO)	10%
Capital Group U.S. Small and Mid Cap ETF (CGMM)	8%
Capital Group Growth ETF (CGGR)	6%
Capital Group New Geography Equity ETF (CGNG)	5%
GROWTH AND INCOME	
Capital Group Core Equity ETF (CGUS)	16%
Capital Group Dividend Value ETF (CGDV)	9%
Capital Group Dividend Growers ETF (CGDG)	5%
Capital Group International Core Equity ETF (CGIC)	3%
TAX–EXEMPT BOND	
Capital Group Municipal Income ETF (CGMU)	13%
Capital Group Municipal High-Income ETF (CGHM)	10%

American Funds Tax-Aware Moderate Growth Model Portfolio*



GROWTH	
Capital Group Global Equity ETF (CGGE)	20%
Capital Group Growth ETF (CGGR)	18%
Capital Group Global Growth Equity ETF (CGGO)	12%
Capital Group U.S. Small and Mid Cap ETF (CGMM)	10%
Capital Group New Geography Equity ETF (CGNG)	7%
GROWTH AND INCOME	
Capital Group Core Equity ETF (CGUS)	18%
Capital Group International Core Equity ETF (CGIC)	3%
TAX–EXEMPT BOND	
Capital Group Municipal High-Income ETF (CGHM)	6%
Capital Group Municipal Income ETF (CGMU)	6%

American Funds Tax-Aware Moderate Growth and Income Model Portfolio*



GROWTH	
Capital Group Global Equity ETF (CGGE)	14%
Capital Group Global Growth Equity ETF (CGGO)	8%
Capital Group U.S. Small and Mid Cap ETF (CGMM)	5%
Capital Group New Geography Equity ETF (CGNG)	4%
GROWTH AND INCOME	
Capital Group Core Equity ETF (CGUS)	14%
Capital Group Dividend Value ETF (CGDV)	13%
Capital Group Dividend Growers ETF (CGDG)	7%
Capital Group International Core Equity ETF (CGIC)	2%
TAX–EXEMPT BOND	
Capital Group Municipal High-Income ETF (CGHM)	18%
Capital Group Municipal Income ETF (CGMU)	15%

American Funds Tax-Aware Conservative Growth and Income Model Portfolio*



GROWTH	
Capital Group Global Equity ETF (CGGE)	9%
GROWTH AND INCOME	
Capital Group Dividend Growers ETF (CGDG)	15%
Capital Group Dividend Value ETF (CGDV)	13%
Capital Group Conservative Equity ETF (CGCV)	5%
Capital Group Core Equity ETF (CGUS)	5%
Capital Group International Core Equity ETF (CGIC)	2%
TAX–EXEMPT BOND	
Capital Group Municipal High-Income ETF (CGHM)	25%
Capital Group Municipal Income ETF (CGMU)	22%
Capital Group Short Duration Municipal Income ETF (CGSM)	4%

American Funds Tax-Aware Moderate Income Model Portfolio*



GROWTH	
Capital Group Global Equity ETF (CGGE)	8%
GROWTH AND INCOME	
Capital Group Dividend Value ETF (CGDV)	11%
Capital Group Dividend Growers ETF (CGDG)	9%
Capital Group Conservative Equity ETF (CGCV)	5%
Capital Group Core Equity ETF (CGUS)	4%
TAX–EXEMPT BOND	
Capital Group Municipal High-Income ETF (CGHM)	25%
Capital Group Municipal Income ETF (CGMU)	25%
Capital Group Short Duration Municipal Income ETF (CGSM)	13%

American Funds Tax-Aware Conservative Income Model Portfolio*



GROWTH	
Capital Group Global Equity ETF (CGGE)	3%
GROWTH AND INCOME	
Capital Group Conservative Equity ETF (CGCV)	7%
Capital Group Dividend Growers ETF (CGDG)	5%
Capital Group Core Equity ETF (CGUS)	3%
Capital Group Dividend Value ETF (CGDV)	3%
TAX–EXEMPT BOND	
Capital Group Short Duration Municipal Income ETF (CGSM)	34%
Capital Group Municipal Income ETF (CGMU)	30%
Capital Group Municipal High-Income ETF (CGHM)	15%

American Funds Tax-Exempt Preservation Model*



TAX–EXEMPT BOND	
Limited Term Tax-Exempt Bond Fund of America® (LTEFX)	40%
Capital Group Short Duration Municipal Income ETF (CGSM)	30%
American Funds Short-Term Tax- Exempt Bond Fund (ASTFX)	30%

Footnote/Important information:

*Effective September 30, 2026, American Funds Tax-Aware Growth and Income Model Portfolio will be renamed to Capital Group ETF Tax-Aware Growth and Income Model, American Funds Tax-Aware Moderate Growth Model Portfolio will be renamed to Capital Group ETF Tax-Aware Moderate Growth Model, American Funds Tax-Aware Moderate Growth and Income Model Portfolio will be renamed to Capital Group ETF Tax-Aware Moderate Growth and Income Model, American Funds Tax-Aware Conservative Growth and Income Model Portfolio will be renamed to Capital Group ETF Tax-Aware Conservative Growth and Income Model, American Funds Tax-Aware Moderate Income Model Portfolio will be renamed to Capital Group ETF Tax-Aware Moderate Income Model, American Funds Tax-Aware Conservative Income Model Portfolio will be renamed to Capital Group ETF Tax-Aware Conservative Income Model, and American Funds Tax-Exempt Preservation Model Portfolio will be renamed to Capital Group ETF-MF Tax-Exempt Preservation and Income Model.

Data based on the target allocations of the underlying funds.

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