We’ve made enrollment easy.
With flexible enrollment options and a range of resources, we’ve made the enrollment process easy for plan sponsors and participants alike. Whether you’re starting a new plan or converting an existing one, it’s the same simple process.

The enrollment process in three easy steps

**STEP 1** Welcome

Introduce employees to their retirement plan with a welcome email or letter.

This is a good time to share important plan information, including the fee disclosure and a blackout notice for conversion plans. We make this step easy for you by providing these documents and a sample email or letter text.

**STEP 2** Get ready

Use our enrollment resources to help employees learn about the benefits of their retirement plan and make informed investment decisions.

**Email notifications**

We offer a range of employee enrollment notifications and reminders to highlight the benefits of your company’s retirement plan.

**Enrollment guide**

The enrollment guide contains essential plan details and educational information, including how to choose a contribution amount and investments.

**Educational website**

Your plan includes a customized website that gives employees a resource to learn about their plan, get detailed investment information and access interactive retirement-planning tools.

Both the guide and website can be used to help lead an enrollment meeting.

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Investments are not FDIC-insured, nor are they deposits of or guaranteed by a bank or any other entity, so they may lose value.
**STEP 3 Enroll**

You have a choice of online and paper solutions for enrollment.

**Online enrollment***

When employees take advantage of our mobile-friendly website for enrollment, you don’t have to collect enrollment forms or make time-consuming data entries. Employees will also benefit from a faster enrollment so they can start saving sooner.

**Paper enrollment**

Paper forms can be a great addition to enrollment meetings, because employees can complete them on the spot – or bring them home to discuss with their family. Forms may also be useful for employees that don’t have access to a computer or mobile device.

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**Online participant enrollment experience**

1. **Sam learns her company has a retirement plan**
   
   Sam receives an email from her employer that says she’s now eligible to participate in their retirement plan.

2. **Sam reviews information about how to participate in the plan**
   
   Sam gets an email from us that highlights the benefits of her retirement plan and includes a link to the enrollment website. Sam is feeling indecisive, though, so she puts off enrollment for now.

   Sam receives a follow-up email from us that reminds her of the many benefits of participating in her plan. This time she clicks the link to her plan’s customized educational website to learn more about the plan and how to start saving for retirement.

3. **Sam enrolls in the plan**
   
   Feeling more confident, Sam completes her enrollment online. She can now track her retirement savings progress and take advantage of other tools to help her pursue her goals.

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**You’ve got help along the way**

Your plan’s financial professional is available to assist you at every step of the enrollment process – and beyond.

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*Online enrollment is not currently available for RecordkeeperDirect.
### Beyond enrollment: The tools for success

Once enrolled, participants can take advantage of our online retirement planning tools and resources to make the most of their plan.

<table>
<thead>
<tr>
<th>Feature</th>
<th>PlanPremier*¹</th>
<th>RecordkeeperDirect*²</th>
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</thead>
<tbody>
<tr>
<td>Access educational content to help optimize your savings plan.</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Use our interactive planning tools to help you consider potential changes in your savings plan.</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>Rebalance your asset mix so your portfolio stays aligned with your investment goals.</td>
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<tr>
<td>View your balance and track your retirement savings progress.</td>
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<td>✔️</td>
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<tr>
<td>See your projected retirement income based on your current savings.</td>
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<td>✔️</td>
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<tr>
<td>Learn how your savings stacks up to your peers.</td>
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<tr>
<td>See how estimated health care costs could impact your retirement income.</td>
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</tbody>
</table>

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### Better outcomes begin with a better enrollment process

Help provide the best participant experience and get more time to focus on your business with our:

- Flexible enrollment options
- Easy enrollment process
- Savings tools and resources

**To learn more, speak with your plan’s financial professional or your retirement plan contact.**

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*¹ PlanPremier is designed for larger plans that typically have $750,000 to $10 million or more in assets.

*² RecordkeeperDirect is designed for smaller plans that typically have up to $1.5 million in assets.

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