WISDOM OF EXPERIENCE: LESSONS FROM BOOMERS AND RETIRED INVESTORS

TAKE A LONG-TERM APPROACH AND STICK TO A PLAN

- 64% say sticking to their investment plan makes them feel smarter.
- 69% don’t change their plan in reaction to market fluctuations.
- 74% believe a well-designed portfolio can outperform the market and do better than average.

CONTINUE TO GROW YOUR NEST EGG IN RETIREMENT

- 86% expect their nest egg to provide income and grow in retirement.
- 75% plan to stay invested in equities to help grow their nest egg in retirement.
- 72% believe that mutual funds with objectives like growth and income, lower volatility and low fees can help people enjoy a better retirement.

PROTECT AGAINST THE DOWNSIDE

- 78% rank protecting savings and investment gains from market downturns as a key priority.
- Only 53% are aware that index funds expose investors to the full ups and downs of the market – a potential blind spot.

START INVESTING EARLY

- 31% of surveyed investors began saving for retirement before the age of 25.
- 64% advise their children/grandchildren to start saving before the age of 25.

Based on an online survey of 1,035 investors age 50 and over with $100,000 or more of investible assets conducted by APCO Insight October 19-22, 2015.

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

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