Help your clients pass the volatility test by overcoming the power of emotion. Here are 7 principles to share to help manage down markets.

Show clients why investment selection is key

As you participate in plan reviews with your clients, show them why the selection of investments for the plan can be crucial to participant retirement outcomes.

New mobile apps for participants

Encourage clients to let participants know that they can now manage their retirement plan accounts on their mobile devices by downloading the American Funds RKDirect 401k app or American Funds PlanPremier 401k app from the App Store or Google Play.

Stay compliant with dealer guidelines

Keep track of Capital Group retirement plan dealer firm requirements with our guidelines sheet, which includes updates for Cetera, Morgan Stanley, Northwestern Mutual and UBS.

If you have questions about any of these resources, please call (800) 421-9900 and we’ll be happy to help.

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

Investors should carefully consider investment objectives, risks, charges and expenses. This and other important information is contained in the fund prospectuses and summary prospectuses, which can be obtained from a financial professional and on capitalgroup.com and should be read carefully before investing.

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