With year-end approaching, use our brochure to show financial professionals what cash balance plans have to offer, which employers may benefit most, and sample investment allocations.

Webinar: Washington update on retirement plans

Support your clients with the latest post-election updates on legislative issues regarding employer-sponsored retirement plans – DOL fiduciary rule 2.0, SECURE Act 2.0, ESG and more – by joining our live webinar on Tuesday, December 15, at 4 p.m. ET / 1 p.m. PT.

Get valuable insights from TPA Forum replays

Three videos from the virtual TPA Leaders’ Forum are available on the TPA website at capitalgroup.com/TPA, including:

- On purpose leadership with Dominick Quartuccio
- A day in the life of an American Funds internal sales associate
- Broker-dealer insights

Plan notice service makes delivery easier

With annual plan notice deadlines approaching, you might remind clients in RecordkeeperDirect® and PlanPremier®-TPA that sponsors and TPAs can upload notices and mailing lists, and we’ll mail the notices to participants for a fee of $2 per participant.

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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