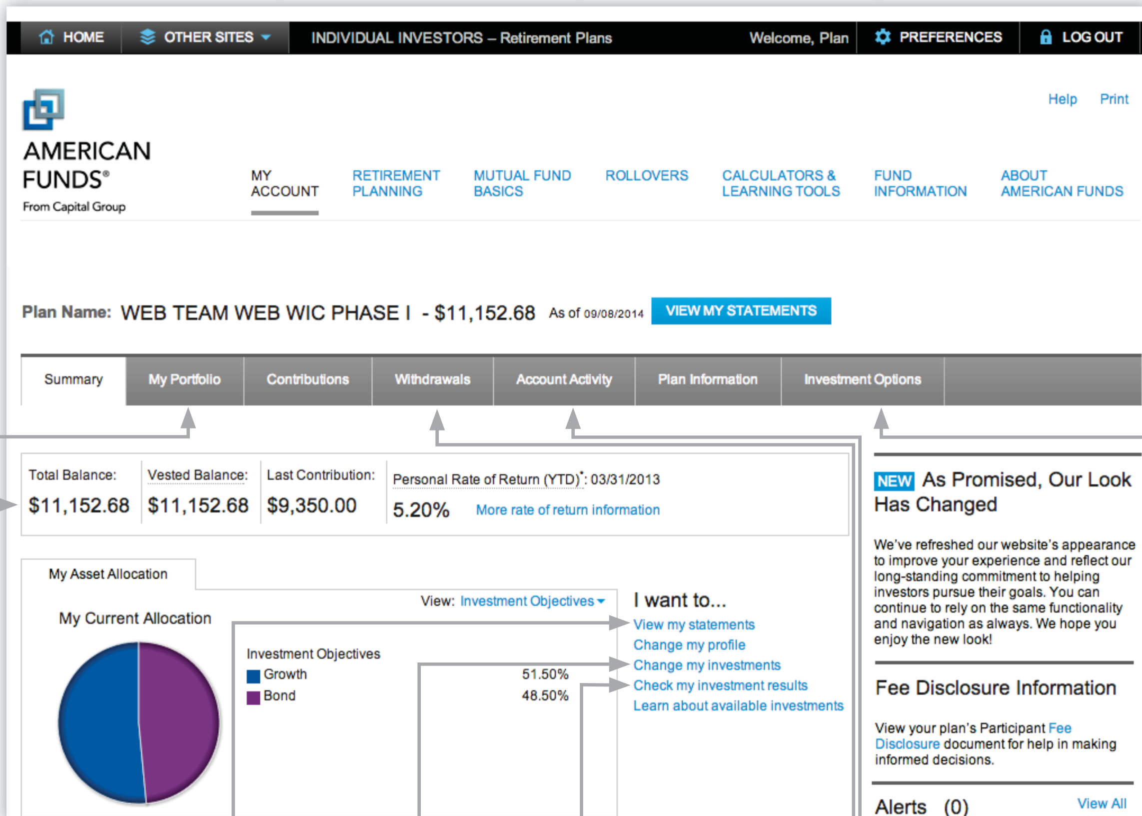
AMERICAN FUNDS®
From Capital Group



## Easy access online

- Visit **americanfunds.com/retire** and then click on **Log in**. If this is the first time you are accessing the participant website, please select the "New user?" link on the login page.
- If you need assistance, please call **(800) 421-6019**.




### Check your balance
View your account balance (summarized by investment objective or by contribution type) as of the previous business day's market closing.

### Account statements
View your account activity over quarterly time periods, and sign up to receive email notifications when your statements are available to view online. You can also request printed statements for other time periods and sign up for e-delivery to stop receiving paper statements.

### Change investments
Lets you exchange or rebalance your investments, or change your future contributions in a few easy steps.

### Investment results
Get a snapshot of your balance, investment allocations and rate of return.

### Loans & withdrawals
Request a withdrawal from your account or model a prospective loan. Withdrawal requests received via the website will be sent electronically to your employer for approval.

### Account activity
Get your beginning and ending balance and see the net change in your balance over a specific time period. You can also view a detailed transaction history.

### Investment options
View the investment options available in your plan, together with investment details and prospectuses.

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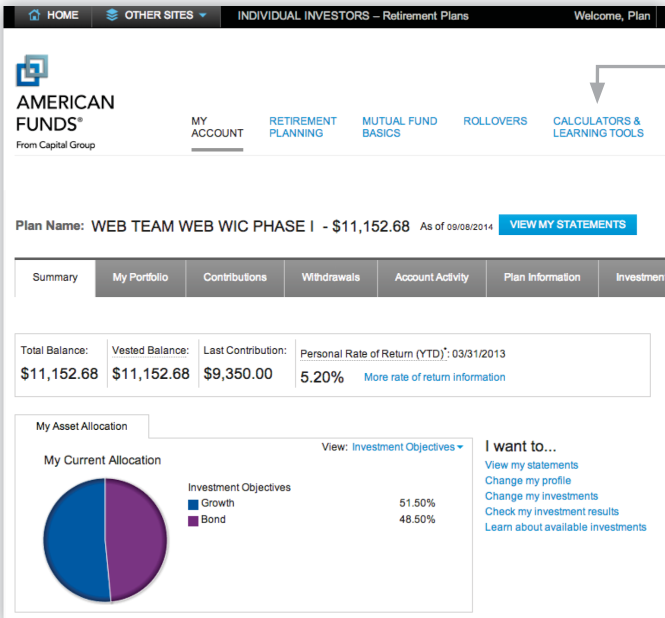
**Investments are not FDIC-insured, nor are they deposits of or guaranteed by a bank or any other entity, so they may lose value.**




Check out the interactive calculators and learning tools that help you prepare for retirement with projections based on your own situation.

**These resources include:**

**American Funds Retirement Roadmap®**

Plan your route to retirement by figuring out how much you might need to contribute each month. Then use the roadmap to decide how to invest your contributions.

**Spend it or save it calculator**

See the difference between taking a cash distribution and rolling your account balance into a new plan or IRA.

**Investing calculator**

Estimate what your account balance may be worth when you're ready to retire.

**American Funds Retirement Planning Calculator**

Find out if your projected savings are on track to help you reach your retirement goal with one of two calculators: a quick analysis or a detailed analysis that takes into account all your assets.

**Plan name:**

**Financial professional's name:**

**Firm name:**

**Address:**

**Phone number:**

**Email:**

## Easy access by phone

Your plan's interactive voice response system makes monitoring your account simple and convenient.

- Call toll-free (877) 833-9322 anytime.
- Enter your Social Security number (SSN) followed by #.
- Enter your personal identification number (PIN) followed by #.

  (If you haven't set up a PIN, use your date of birth in the format "MMDDYYYY.")

**For retirement plan information, press 1 and then:**

- Press 1 for **account inquiries** about account balances, investment elections, prices and yields, loan and withdrawal information (if applicable)
- Press 2 for **account transactions**, such as exchanges and changes to future contribution allocations
- Press 3 for **duplicate statement requests**
- Press 4 for **transaction history**

From the main menu, press 2 to change your PIN.

Please call (800) 421-6019 if you've forgotten your PIN or need assistance.

**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 should be read carefully before investing. Some of this information may differ if the investment is offered through a group annuity product – please consult your financial professional for more information.**

**RecordkeeperDirect®** Lit. No. RPDRBR-002-1014O CGD/8146-S42719 

Accessing your account

CAPITAL GROUP® | AMERICAN FUNDS®

# Get started

- Go to americanfunds.com/retire or download the **American Funds RKDirect 401k app** from the App Store or Google Play. **Note:** There are multiple American Funds 401(k) apps; make sure to get the **RKDirect** version.
- Click **New user** to log in for the first time.

## Manage your account

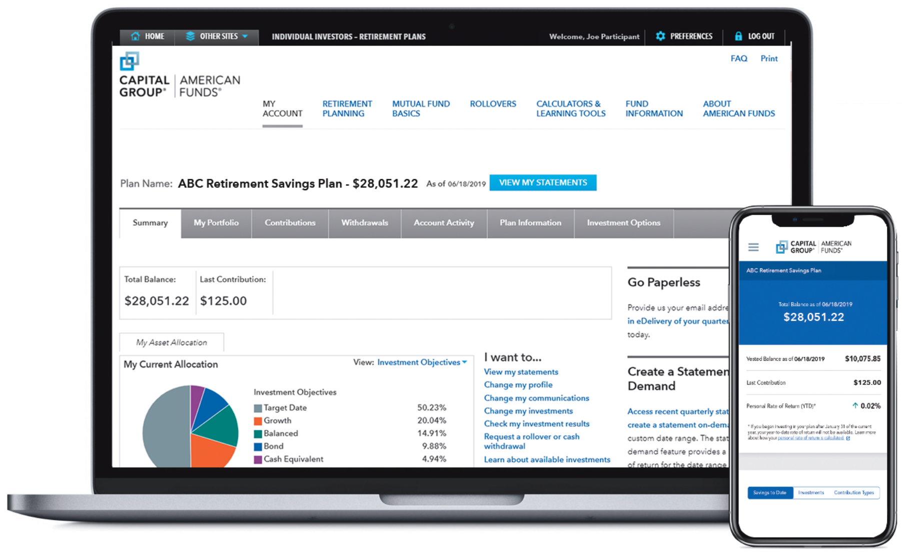
**Review your balance and account activity**

**View your statements** and tax forms (website only)

**Exchange or rebalance** your investments

**See your rate of return**

**Review your investment options** and get detailed fund information




## Stay on track with our interactive tools

### Retirement planning calculator

Find out if your projected savings are on track to help you reach your retirement goal.

### Spend it or save it calculator

See the difference between taking a cash distribution and continuing to allow your account balance to grow tax-deferred, such as in a rollover IRA.

### Investment calculator

Estimate what your account balance may be worth when you're ready to retire.

### Traditional vs. Roth 401(k)/403(b) analyzer

Compare the results of traditional before-tax savings and Roth after-tax savings.

### Manage your account by phone

Call our 24/7 automated phone system at **(877) 833-9322.**

### Need help?

Call us at **(800) 421-4120** for assistance.

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