CAPITAL GROUP®

A trusted partner to help you acquire and serve wealthy clients

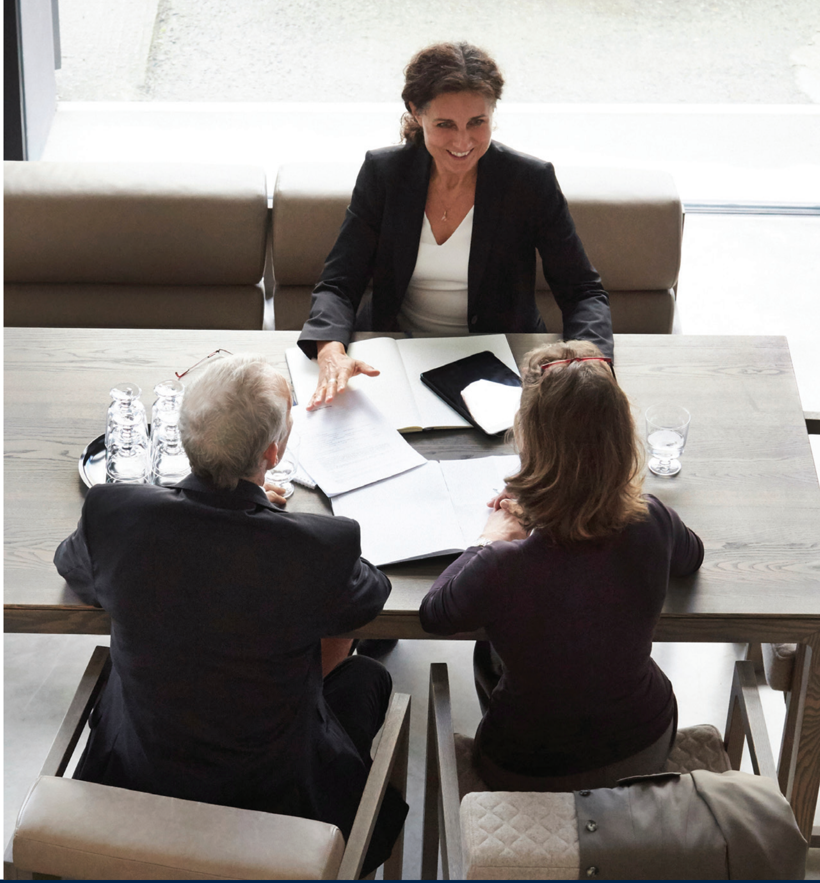
Building on our long history of investment experience and trust, Capital Group helps financial professionals acquire, expand and protect their most complex client relationships through customized and comprehensive wealth management solutions.

Investments are not FDIC-insured, nor are they deposits of or guaranteed by a bank or any other entity, so they may lose value. For financial professionals only. Not for use with the public.

Let us help you excel with existing clients and wealthy prospects

Our private wealth management division, Capital Group Private Client Services, provides you and your clients customized planning solutions, targeted for the wealthiest investors. Our turnkey program offers you three key benefits:

1. **Trust**: A partnership with a firm you know and trust
2. **Resources**: Extensive services to help you grow your high and ultra high net worth business
3. **Experience**: Deep knowledge that we put to work for you and your wealthiest clients



1. Trust: A partnership with a firm you know and trust

You've long relied on Capital Group for proven investment management. Now, you can count on us for your high net worth clients and prospects. Capital Group Private Client Services offers you and your clients the following:

- Personalized portfolio construction
- Comprehensive and customized wealth planning
- Extensive support centered on the needs of your business

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CAPITAL GROUP®
PRIVATE CLIENT SERVICES

Financial professionals have long counted on Capital Group and American Funds to help them serve clients and grow their practices. American Funds was selected most often for these attributes:

- **Is a company I trust**
- **Is reliable**
- **Delivers consistent performance**
- **Offers tools, services that enable me to create a portfolio that meets my needs**
- **Risk management**
- **Inspires confidence**
- **Has a disciplined investment process**
- **Has quality global product offerings**

Source: Escalent, Cogent Syndicated, Advisor Brandscape™, June 2023. Methodology: Based on a survey of 1,541 registered financial advisors who provided feedback between January through March 2023. The respondents consisted of financial advisors with an active book of business of at least $5 million who offer investment advice or planning services to individual investors on a fee or transaction basis. Among "Brand Imagery among Mutual Fund Companies or Asset Managers," for Tier 1 attributes, American Funds was selected most often in response to the question, "Which -- if any -- of these mutual fund companies ... `Is a company I trust,' `Is reliable,' `Delivers consistent performance,' `Offers tools, services that enable me to create a portfolio that meets my needs,' `Inspires confidence,' and `Has quality global product offerings'?" For Tier 2 attributes, American Funds was selected most often in response to the question, "Which -- if any -- of these mutual fund companies ... `Offers tools, services that enable me to create a portfolio that meets my needs,' `Has a disciplined investment process,' and `Has quality global product offerings'?" Among "ETF Company Ratings Across Loyalty Drivers," for Tier 1 attributes, American Funds was selected among the leading companies for "Risk management" in response to the question related to advisor experience and loyalty and commitment. Capital Group has provided input on some questions to be included in Cogent surveys over time. The document containing these survey results was purchased for use by Capital Group/American Funds. Learn more at escalent.com.

2. Resources: Extensive services to help you grow your high and ultra high net worth business

It takes a lot to turn compelling opportunities into loyal clients. Our service is designed to give you an edge in opening and servicing clients who were previously out-of-reach.

- A dedicated Wealth Advisor partners with you to provide knowledge and experience
- Access to the full breadth of our resources, including wealth, trust and estate, and investment specialists
- No need for you to develop costly infrastructure
- Flexible and turnkey service model integrates seamlessly with your current team to make the process easy for you

3. Experience: Deep knowledge that we put to work for you and your wealthiest clients

Capital Group Private Client Services provides an invaluable understanding of this distinct and competitive market.

- Capital Group Private Client Services is part of Capital Group, one of the world's oldest and largest asset managers
- Founded as a family office 50 years ago
- Decades of experience working directly with high net worth families, endowments and foundations

Personalized investment management

We offer a broad range of investment and wealth planning services custom-tailored to your client or prospect.

CLIENTS NEEDS

- Retire successfully
- Transfer wealth to the next generation
- Reach philanthropic goals
- Sell a business
- Manage executive stock options and concentrated positions
- Help endowment and foundation boards manage fiduciary responsibilities

WE HAVE THE TOOLS YOU REQUIRE

- Customized asset allocation
- Portfolio insights report
- Sell/hold analysis
- Income planning
- Concentrated stock analysis
- Investment policy statement guidance
- Equity compensation analysis
- Legacy planning
- Financial education
- Life insurance analysis
- Roth conversion analysis
- Quarterly capital market updates
- ESP review
- Goals-based planning

How our turnkey process works to help you with your ultra high net worth clients and prospects:

1 **Talk with us:** Reach out to your American Funds Wealth Management Consultant to see how Capital Group Private Client Services can augment your team's current capabilities to win and retain more high net worth clients.

2 **Request:** Select Capital Group Private Client Services, which is available via Envestnet's Outsourced Consulting platform in the proposal tool.

3 **Analyze:** Our team will build a plan customized to your client's financial situation and personal goals, including a holistic view of their assets and tax considerations.

4 **Propose:** Our Wealth Advisor and team of specialists will join you for the prospect meeting to explain the proposal, answer questions and provide any help you need to retain a valuable client or to turn a promising prospect into a client.

5 **Review:** We'll provide regular portfolio reviews and, in consultation with you and your client, will make any needed changes to a wealth management plan.

6 **Service:** We'll be there throughout the course of your client relationship to provide the assistance and servicing you need or just to answer your general questions.

Contact your Capital Group representative to learn more about how we can build a lasting relationship.

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