



Get started

Access and manage your account

- Go to capitalgroup.com/retire and click **Log In** at the top right.
- If accessing your account for the first time, click **New User?** to register your account.

- 1 Review your balance**
See how much you've saved toward your retirement.
- 2 View your contributions**
- 3 See your rate of return**
View how much your investments have returned year-to-date.
- 4 View your statements**
Access account statements and tax documents.
- 5 Review your investment options**
See detailed fund information to help allocate your savings.
- 6 Change your investments**
Exchange to a new fund or rebalance your account between funds.
- 7 Manage your preferences**
Click **Preferences** to access the About Me page.

Welcome, Oscar | US - Individual Investors - Retirement Plans | My Account | Preferences | FAQ | Print | Log Out

CAPITAL GROUP[®] | AMERICAN FUNDS[®]

RETIREMENT PLANNING | MUTUAL FUND BASICS | ROLLOVERS | CALCULATORS & LEARNING TOOLS | FUND INFORMATION | ABOUT US

Plan Name: ABCD COMPANY SIMPLE IRA PLUS PLAN - \$16,842.19 04/19/2022 **VIEW MY STATEMENTS**

Summary	My Portfolio	Contributions	Withdrawals	Account Activity	Plan Information	Investment Options
Total Balance: \$16,842.19	Last Contribution: \$80.00	Personal Rate of Return (YTD): 04/19/2022 3.34% More rate of return information				

My Asset Allocation

My Current Allocation View: Investment Objectives

Investment Objectives	Percentage
Target Date	50.23%
Growth	20.04%
Balanced	14.91%
Bond	9.88%
Cash Equivalent	4.94%

I want to...

- View my statements and tax forms
- Change my profile
- Change my communications
- Change my investments
- Check my investment results
- Request a withdrawal
- Learn about available investments

Access 1099-R tax forms and year-end statements

For distributions taken in 2021, 1099-R tax forms can be found online after January 11. Year-end statements are also available in the same location.

You can sign-up today for electronic notification of new tax forms and transaction confirmations by updating your preferences.

Go Green with Paperless Communications

By providing your email address, you can discontinue paper mailings and receive email notifications when your tax forms and transaction confirmations are viewable online. Electronic statements are environmentally friendly and provide convenient access to account information. [Update your preferences today.](#)

- a Add or update your beneficiaries**
- b Go paperless** by adding an email address to receive electronic notifications when your statements, transaction confirmations and tax forms are available.

About Me

About Me	Beneficiaries	Communications
Personal Information <p>Name: Oscar Participant</p> <p>Date of birth: 01/01/1980</p> <p>Date of hire: 01/03/2022</p> <p>Marital status: Unknown</p>	Address & Contact Information Make Changes <p>Mailing address</p> <p>12711 N MERIDIAN ST</p> <p>CARMEL, INDIANA 46032-9181</p> <p>Contact Information</p> <p>Phone:</p>	

See see reverse side for more tools available online



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) 421-6621** for assistance.

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