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## Forms & Literature

(including [applications](#))

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- [Returns & Daily Prices](#)
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- [Hypotheticals](#)
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- [Asset mix worksheet](#)
- [New portfolios from American Funds](#)
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## Our Other Websites

(including the [Shareholder Site](#))

## Market Indices

## Sign up for email

For sales ideas, news and commentary from American Funds.



## Is it time for a retirement reality check?

Use our [5 retirement realities](#) as a guide for effective conversations with your clients.



## Client conversations resources

## New retirement plan fee-disclosure regulations are final

On February 2, the Department of Labor released [final service provider fee-disclosure regulations and effective dates](#) that also affect participant disclosure.

## Quarterly fund fact sheets available to view and order



*Resource Guide* individual fund pages, with updated statistics and information, are available about 4 weeks after each quarter-end.

[View by fund](#) | [Order](#)

## Follow the steps to make the most of your annual client reviews

Use our 4-step review process to prepare for one of the most important conversations you'll have all year.

[4-step client review](#) | [4-step retirement plan review](#)

## The Long View: The year of living uncertainly

Gain perspective on how a [consistent, long-term investing view](#) (PDF) can offer your clients relief from last year's uncertainty.

**Depending on your state of residence, there may be an in-state plan that provides tax and other benefits not available through CollegeAmerica.** Before investing in any state's 529 plan, you should consult your tax adviser.

## Commentary

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[2011 review/2012 outlook](#)

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[The Long View](#)  
[The year of living uncertainly](#) (PDF)

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[Progress report on Europe](#)

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## Quarterly Fund Reviews

## News

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- [The Investment Company of America: Dividend date change](#) 2/7/12
- [Fee changes for American Funds share classes](#) 1/20/12
- [District of Columbia and Michigan state tax withholding changes](#) 1/20/12
- [2011 year-end distributions](#) 1/13/12
- [New phone number for investors](#) 1/3/12
- [How to find the account information your clients need](#) 12/6/11
- [Upcoming year-end deadlines](#) 12/2/11
- [Redesigned quarterly statements for your clients](#) 9/30/11

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Investing outside the United States involves risks, such as currency fluctuations, periods of illiquidity and price volatility, as more fully described in the prospectus. These risks may be heightened in connection with investments in developing countries. Small-company stocks entail additional risks, and they can fluctuate in price more than larger company stocks. The value of fixed-income securities may be affected by changing interest rates and changes in credit ratings of the securities. Lower rated bonds are subject to greater fluctuations in value and risk of loss of income and principal than higher rated bonds. Income from tax-exempt bond funds may be subject to state or local income taxes. Additionally, income from all tax-exempt bond funds except for The Tax-Exempt Bond Fund of America may be subject to the federal alternative minimum tax. Certain other income from tax-exempt bond funds, as well as capital gain distributions, may be taxable. Fund shares of U.S. Government Securities Fund are not guaranteed by the U.S. government. State-specific tax-exempt funds are more susceptible to factors adversely affecting issuers of their states' tax-exempt securities than more widely diversified municipal bond funds. **Although the money market fund seeks to preserve the value of your investment at \$1.00 per share, it is possible to lose money by investing in the fund. For more information about the risks associated with each fund, go to its detailed fund information page or read the prospectus.**

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Information provided at [americanfunds.com/adviser](#) is intended for use by financial advisers with persons who are eligible to purchase U.S.-registered investment funds.

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UPDATED ON: 12/11

2. ["Small-business retirement plan options" brochure](#)

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3. [Adviser's Guide](#)

UPDATED ON: 12/11

4. [Summary prospectus — Capital World Bond Fund](#)

UPDATED ON: 12/11

5. [Summary prospectus —](#)



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### "Small-business retirement plan options" brochure

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### [Summary prospectus — American Mutual Fund](#)

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The summary prospectus provides key fund information, including the retirement plan share classes, and may be used in lieu of delivering a full statutory prospectus, even when giving clients sales literature that must be preceded or accompanied by a prospectus. [More info](#)

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- American Funds Money Market Fund®
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- American Funds Short-Term Tax-Exempt Bond FundSM
- American Funds Target Date Retirement Series®
- American Funds Tax-Exempt Fund of New YorkSM
- American High-Income Municipal Bond Fund®
- American High-Income TrustSM
- American Mutual Fund®
- The Bond Fund of AmericaSM
- Capital Income Builder®
- Capital World Bond Fund®
- Capital World Growth and Income FundSM
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Hypotheticals  
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## Sales Ideas

### Is it time for a retirement reality check?

Use our [5 retirement realities](#) as a guide for effective conversations with your clients.



Client conversations resources

These sales ideas can help you create investment strategies for your clients and address common investment concerns. There are also ideas to help you build your business.

#### On this page:

- [Classic fund combinations](#)
- [American Funds](#)
- [Market/economy](#)
- [College saving](#)
- [Retirement saving](#)
- [Income planning](#)
- [Portfolio/plan reviews](#)
- [Business building](#)

### Classic fund combinations

- [All-Weather Foundation](#) **Hypothetical**  
For clients seeking both growth and stability in the face of market fluctuations.
- [Conservative Equity Foundation](#) **Hypothetical**  
For prudent investors who want to invest for long-term growth.
- [Income Foundation](#) **Hypothetical**  
For clients who are concerned about volatility but need income and moderate growth.
- [TRIAD](#) **Hypothetical**  
For clients wanting the benefits of a diversified, time-tested core investment.

### American Funds

- [Introducing our new portfolio resources](#) **Hypothetical**  
For advisers who want to create and manage portfolios tailored to their clients' objectives.
- [Introducing American Funds Global Balanced Fund](#)  
For clients who want to invest globally — in a balanced way.
- [I'll just buy the index](#) **Hypothetical**  
For clients who are only interested in buying index funds.

### Market/economy

- [Guide to market recoveries](#)  
Get the facts behind 16 market declines and their subsequent recoveries.
- [A strategy for regaining balance](#) **Hypothetical**  
For clients who are too focused on capital preservation.



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Type first or last name, account or BIN



## Is it time for a retirement reality check?

Use our [5 retirement realities](#) as a guide for effective conversations with your clients.



Client conversations resources

### Quick help

- [How to access client accounts and PlanPremier® PartnerLink®](#)
- [View and print client statements for American Funds and DST Vision® \(PDF\)](#)
- [American Funds and DST Vision website features](#)
- [Viewing and downloading tax forms](#)
- [How to set up a new account](#)
- [Getting started on americanfunds.com client single sheet \(PDF\)](#)

### IRA

- [IRA reports](#)

### Employer-Sponsored Retirement Plans

- [Price-it<sup>SM</sup> tool: Preliminary fee quote](#)

### College Planning

- [Managing your client's CollegeAmerica®](#)



## Products

IRA Center

## Employer-Sponsored Retirement Plans

How to prospect and sell  
How to set up and service  
Retirement plan solutions and share classes  
Retirement plan tools  
Value proposition tool  
Price-it tool: Preliminary fee quote  
Retirement plan proposal  
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Other plan types  
Small-business retirement plans  
Retirement plan view newsletter

College Planning

Variable Insurance

Investing for Nonprofits

# Employer-Sponsored Retirement Plans

## Prepare for a fee-sensitive plan world



Learn about the opportunity — and risk — that new plan fee-disclosure regulations may bring in 2012 and beyond.

## Build more effective lineups

Use our [retirement plan investment evaluator](#) to:



- review investment options with potential clients
- establish fund lineups for new plans
- conduct plan investment reviews

## Quick links

### Retirement plan tools

- [Overview](#)
- [Value proposition tool](#)
- [Price-it tool<sup>SM</sup>](#)
- [Retirement plan proposal](#)
- [Retirement plan investment evaluator](#)
- [Retirement plan cost comparison tool](#)

### Solutions and share classes

- [Compare solutions](#)
- [PlanPremier®](#)
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- [Retirement share classes](#)

### Plan types

- [401\(k\)](#)
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- [SIMPLE](#)
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- [Other plans](#)

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## HOW TO: Prospect and sell

- Find good leads
- Choose a recordkeeping solution
- Close the sale

## HOW TO: Set up and service

- Establish plans
- Enroll employees
- Conduct annual reviews

## Is it time for a retirement reality check?



Client conversations resources

Use our [5 retirement realities](#) as a guide for effective conversations with your clients.

## Why sell retirement plans



### [Bring balance to your business](#) (4:40) [TRANSCRIPT](#)

Retirement plan counselor [Craig Duglin](#) shares his thoughts on why retirement plans can bring balance to your practice.

**Related:** Retirement plan counselor [Heidi Horwitz-Marcus](#) explains how to [optimize your practice](#) with retirement plans.

## Choose American Funds for retirement

- One of the largest defined contribution asset managers
- More than 33,000 retirement plan clients
- One million-plus retirement plan participants

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