Managing your account: RecordkeeperDirect®

Get started on our website or mobile app

Access and manage your account on the website

- Go to **americanfunds.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, including your vested balance if applicable.

2 Change your contributions
View your contributions and change your deferral rate online, if enabled by your plan.

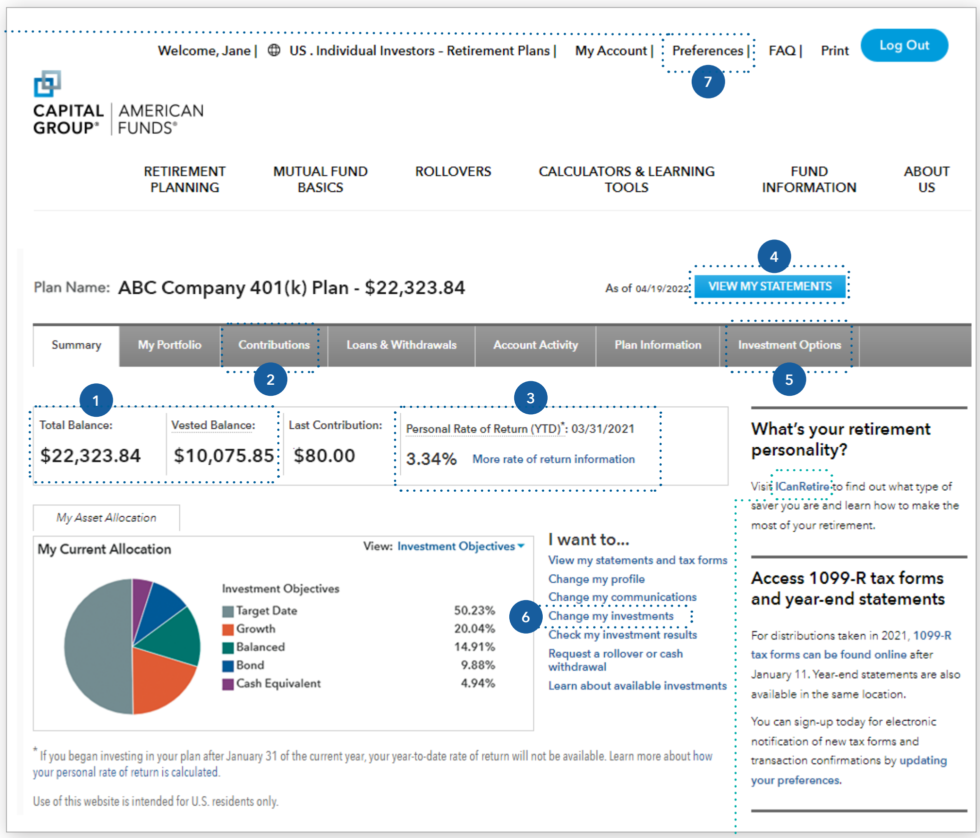
3 See your rate of return
View how much your investments have returned year-to-date.

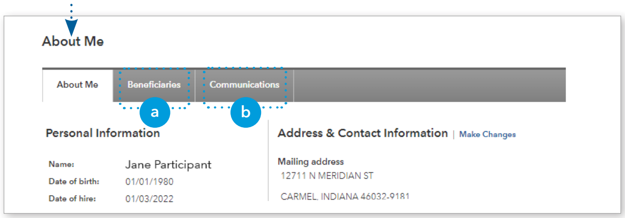
4 View your statements
Access account statements and tax documents.

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.

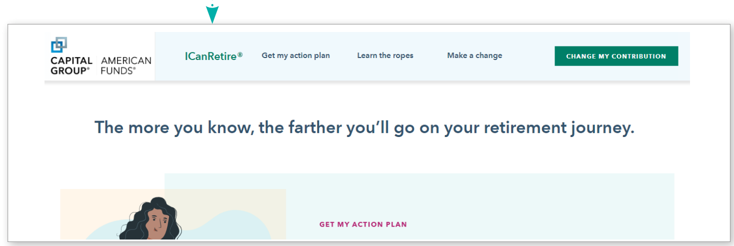
7 Manage your preferences
Click **Preferences** to access the About Me page.





a Add or update your beneficiaries,
if enabled online by your plan.

b Go paperless
by adding an email address to receive electronic notifications when your statements, transaction confirmations and tax forms are available.



Learn more about retirement saving
Visit the **ICanRetire** site to access educational content and get an action plan to help optimize your savings.

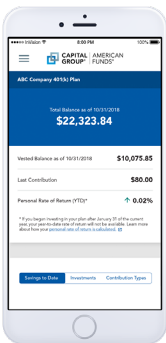
See the following page for information on the mobile app

Access and manage your account on the go with the mobile app

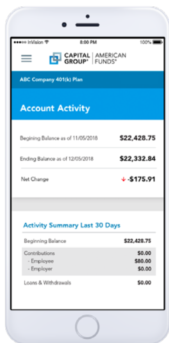
- Download the **American Funds RKDirect 401k app** from the App Store or Google Play.
- If accessing your account for the first time, click **Get started here** to register your account.

There are multiple American Funds apps; make sure to get the correct version. Some functions, including the ability to request a withdrawal or add beneficiaries, are only available on the participant website.

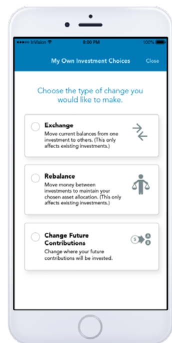
After logging in, use the menu at the top left of the screen to move between different sections of the app.



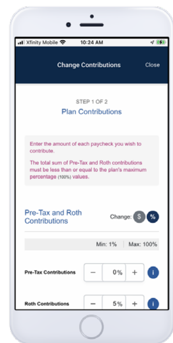
Account overview
View your balances, contributions, investments and personal rate of return.



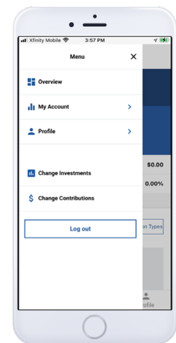
Account activity
See contributions, distributions and the net change to your balance over the last 30 days.



Investment choices
Exchange funds, rebalance your investments or redirect your contributions.



Change contributions
Change your deferral rate through the app, if enabled by your plan.



Manage personal information
Click **Profile** in the menu to change your contact information or view beneficiaries.

Stay on track with our interactive tools

(only available on the website)

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.