



**Employer — complete this section and retain this form for your records**

Do not send this form to American Funds. Use the Plan Sponsor website, [www.americanfunds.com/retiresponsor](http://www.americanfunds.com/retiresponsor), to enter the information provided or changed below.

**Employer authorization**

Name of employer, organization or company

Name of plan

Plan ID number

The employee named in Section 1 below is eligible to participate in the plan as of \_\_\_\_\_  
(mm/dd/yyyy)

Name of person authorized to sign for the employer (print)

Title

**X**

Authorized signature

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Date (mm/dd/yyyy)

**Employee – complete sections 1-4, then return this form to your employer**

**1**

**Employee information**

*Please type or print clearly.*

Select one of the following: ☐ New plan enrollment ☐ Changes to existing account

Full name (include middle initial)

\_\_\_\_-\_\_\_\_-\_\_\_\_\_  
SSN

Residence address (physical address required — **no P.O. boxes**)

City

State

ZIP

Mailing address (if different from residence address)

City

State

ZIP

Email address

( )

Daytime phone

\_\_\_\_-\_\_\_\_-\_\_\_\_\_  
Date of birth (mm/dd/yyyy)

\_\_\_\_-\_\_\_\_-\_\_\_\_\_  
Date of hire (mm/dd/yyyy)

Country of citizenship

**Marital status:** ☐ Married ☐ Single



## 2 Employee contributions

*Before completing this section, check with your plan to determine the available contribution options.*

☐ I authorize my employer to withhold from my wages each pay period:

Before-tax contributions of \_\_\_\_\_% **OR** \$ \_\_\_\_\_

After-tax Roth contributions (as allowed by plan) of \_\_\_\_\_% **OR** \$ \_\_\_\_\_

After-tax non-Roth contributions (as allowed by plan) of \_\_\_\_\_% **OR** \$ \_\_\_\_\_

☐ I **DO NOT** wish to make contributions to the plan at this time.

## 3 Investment selection

*Before completing this section, check with your employer to determine the available investment options.*

**New participants:** Any contributions (conversion assets, payroll deferrals or rollovers) to your account made before you make your investment selection(s) or before your employer updates your account on the recordkeeping system with your selection(s) will be invested in the plan's default investment. Assets will remain in the default investment until you use your plan's website, [www.americanfunds.com/retire](http://www.americanfunds.com/retire), or call your plan's toll-free phone service at **(877) 833-9322** to exchange assets into the investment(s) of your choice.

**Existing participants:** Any allocation changes will apply to future contributions **only** and will not change assets currently held in your account. Your new allocations will not be effective until your employer updates your account. You can immediately update your investment allocations and/or reallocate your current assets by using your plan's website or phone service to make the desired changes. (If you use the website or call to update your account, do not submit this form to your employer.)

Invest my contributions as follows. (Only **whole** percentages will be accepted; must total 100%.)

Investment name	Percentage
1. _____	_____ %
2. _____	_____ %
3. _____	_____ %
4. _____	_____ %
5. _____	_____ %
6. _____	_____ %
7. _____	_____ %
8. _____	_____ %
9. _____	_____ %
10. _____	_____ %

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### 3 Investment selection

(continued)

	Investment name	Percentage
11.	_____	_____ %
12.	_____	_____ %
13.	_____	_____ %
14.	_____	_____ %
15.	_____	_____ %
16.	_____	_____ %
17.	_____	_____ %
18.	_____	_____ %
19.	_____	_____ %
20.	_____	_____ %
	Total	===== %

### 4 Employee signature

By signing below, I acknowledge that I have authorized my employer to allocate my investments as specified in Section 3. I acknowledge that I have completed a beneficiary designation form.

**X**

Signature of employee

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Date (mm/dd/yyyy)