

How to set up your SIMPLE plan online access

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Centennial Financial Group, LLC



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FINANCIAL GROUP, LLC

Investment Adviser Representative offering securities and advisory services through Cetera Advisor Networks LLC, member FINRA / SIPC, a broker-dealer and registered investment adviser. Cetera is under separate ownership from any other named entity

What you will need

- ▶ Your SS# and DOB.
- ▶ Your account number. (located on your statement.)
 - ▶ If you don't have, then your social will work, but you will need to call the number below.
- ▶ Investor's relation number: **800-421-4225 Option 2.**
- ▶ The website:

<https://www.capitalgroup.com/individual/accounts/login.htm>



Step 1

1. If you have your account number, then skip to step 3. Otherwise go to step 2.
2. Call American Funds at 800-421-4225 Option 2. Listen to the prompts. You will need to request your account number from them, and they can also help you walk through the online access steps if you would like.
3. Go to the website:
<https://www.capitalgroup.com/individual/accounts/login.htm>



Step 2

- ▶ You should see this screen, then click “new user” at the top right.



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Log In

WHAT WE OFFER

PLANNING

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ABOUT US

Log in to Your Account

User Name or Account Number

Password

Remember user name

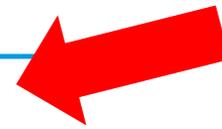
LOG IN

[Where can I find my account number? ▶](#)

[New user?](#)

[Forgot password?](#)

[Security information](#)



Investments are not FDIC-insured, nor are they deposits of or guaranteed by a bank or any other entity, so they may lose value.

Investors should carefully consider investment objectives, risks, charges and expenses. This and other important information is contained in the fund prospectuses and summary prospectuses, which can be obtained from a financial professional and should be read carefully before investing.



Step 3

- ▶ After clicking New User that will take you to this screen where you need to enter your account.
- ▶ Once you enter the account, then click :Next”

New User Account Login

STEP 1 OF 6

Verify Your Identity

Returning user?

Online account access
As easy as 1-2-3

CAPITAL AMERICAN GROUP FUNDS

Account Number

[Where can I find my account number? ▶](#)

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Step 4

- ▶ That will bring you to this screen where you need to verify your account by typing in your SS# and DOB.
- ▶ Once done, then click “Next”

New User Account Login

STEP 1 OF 6

Verify Your Identity

Returning user?

For the protection of your account, we need to further verify your identity. Please enter your personal information below to ensure it matches our records.

Account Number
[REDACTED]

SSN or EIN (last four digits)

Which SSN or EIN should I use? ▶

Date of Birth ⓘ
 mm / dd / yyyy Clear

BACK NEXT

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Step 5

- ▶ Once you verify your information, you will be taken to the below screen and asked to accept terms and conditions..

New User Account Login

STEP 2 OF 6

Terms & Conditions

All information obtained and transactions requested through the site are subject to confirmation in writing by us. Without written confirmation from us, no assurance can be given that the information obtained will be accurate or that the transactions requested will be processed.

The online acknowledgments or other messages that appear on your screen for transactions requested do not mean that the transaction requests have been accepted or rejected. These acknowledgments are only an indication that the transactional information entered by you has either been transmitted, or cannot be transmitted.

In addition, transactions are subject to certain requirements and restrictions outlined in the applicable fund's prospectus and statement of additional information.

Please review your confirmation statements to verify the accuracy of your account and transaction information and notify us immediately of any errors or inaccuracies.

CANCEL

ACCEPT

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Step 6

- ▶ You will then be taken to a screen to create an online account, then click “next.”
- ▶ **NOTE: Keep track of this log in information because this is what you will need to access in the future.**

New User Account Login

STEP 3 OF 6

Online Account Information

User Name

Password

Confirm Password

Email Address

Confirm Email Address

[Privacy Policy](#)



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Step 7

- ▶ Once you set up your account information, then you will be asked your communication preferences.
- ▶ If you don't want any paper to be sent to you, then make sure you select "email" to move all electronic.
- ▶ Then select "next"

New User Account Login

STEP 4 OF 6

Communication Preferences

Choose how you'd like to receive your account statements and other important documents.

Email Address
[REDACTED] [CHANGE](#)

Document Delivery

EMAIL ALL DOCUMENTS

Quarterly Statements – EXAMPLE ▶
 EMAIL PAPER

Prospectuses and Reports – EXAMPLE ▶
 EMAIL PAPER

Tax Forms – EXAMPLE ▶
 EMAIL PAPER

Transaction Confirmations – EXAMPLE ▶
 EMAIL PAPER

Account Activity Notifications – EXAMPLE ▶
 Subscribe to receive recent transaction requests and account update notifications.
Receive an email when you or your financial advisor submits a transaction request, sets up or changes an automatic plan or updates certain account settings.

Your delivery preferences can be changed at any time. Requests to change to paper or paperless delivery may take 4-6 weeks to be processed.



Step 8

- ▶ After you select your preferences, you will be asked to set up a multi step authenticator by having a code sent to either your phone or email.
- ▶ Once this is done, your account is set up and ready to go!

Questions?

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All investing involves risk, including the possible loss of principal. There is no assurance that any investment strategy will be successful.

