How to set up your SIMPLE plan online access

Presented by Ethan Stewart, CFP®

Centennial Financial Group, LLC

CENTENNIAL
FINANCIAL GROUP, LLC

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

CENTENNIAL
FINANCIAL GROUP, LLC

Step 1

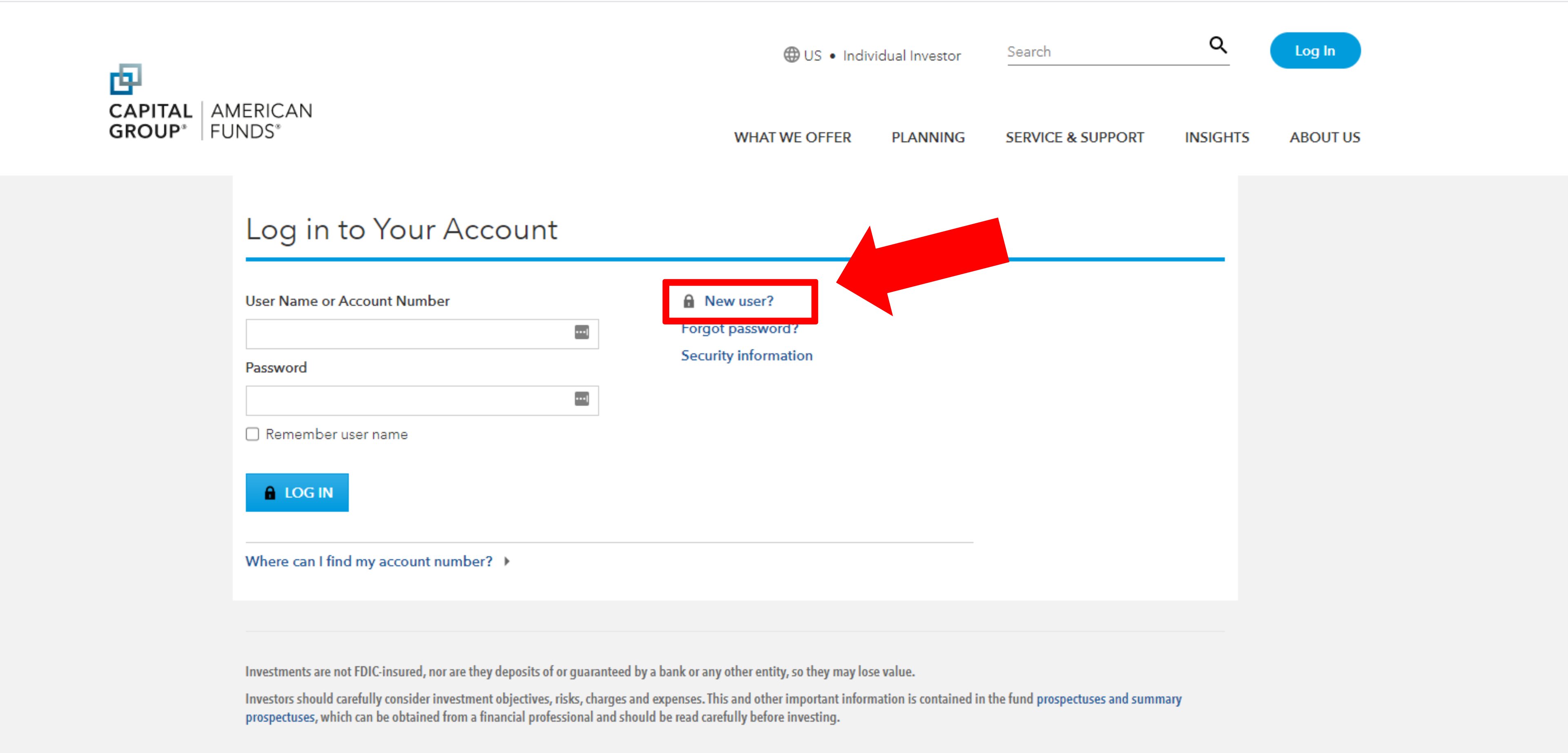
1. If you have your account number, then skip to step 3. Otherwise go to step 2.
2. Call American Funds at 800-421-4225 Option 2. Listen to the prompts. You will need to request your account number from them, and they can also help you walk through the online access steps if you would like.

3. Go to the website: https://www.capitalgroup.com/individual/accounts/login.htm

CENTENNIAL
FINANCIAL GROUP, LLC

Step 2

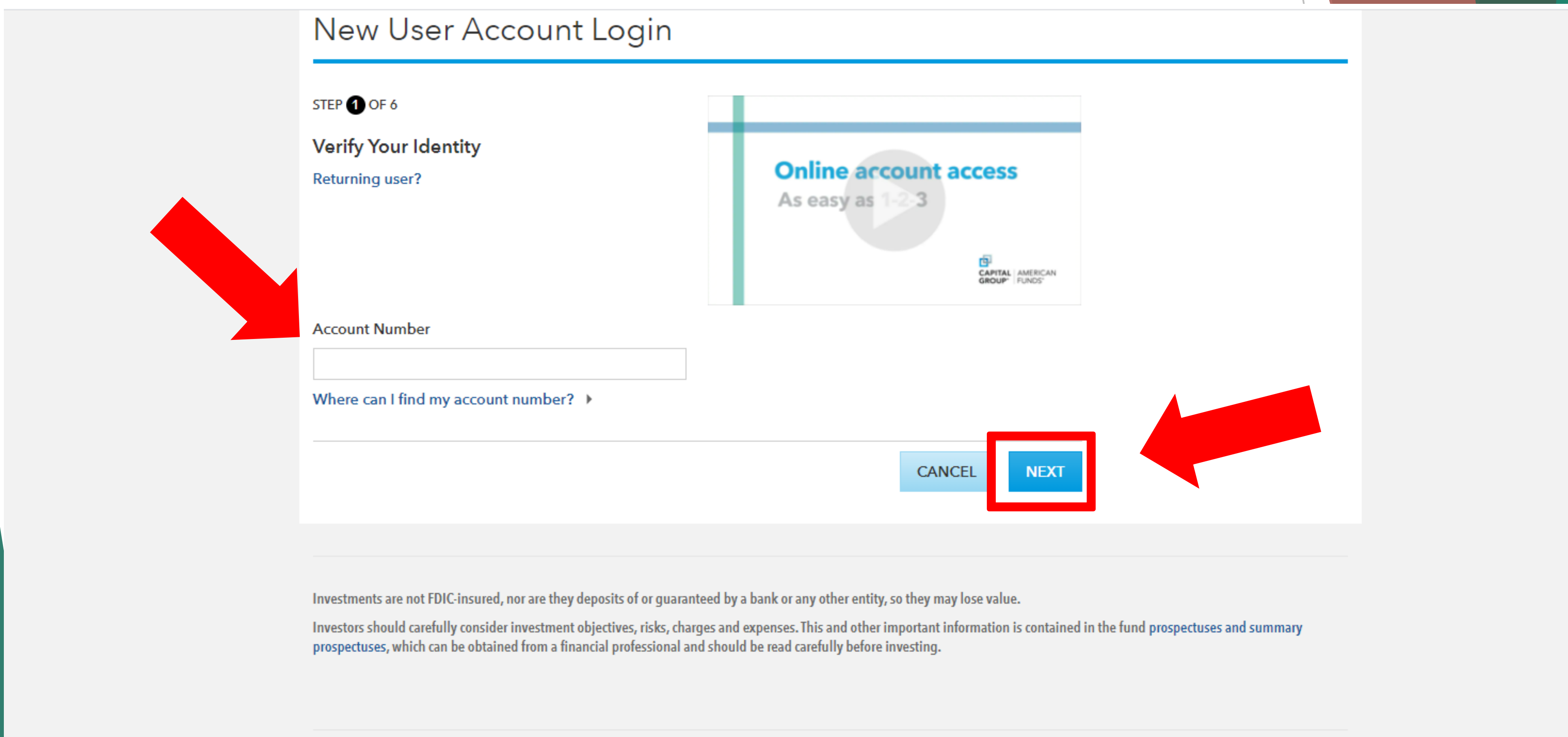
- You should see this screen, then click “new user” at the top right.



CENTENNIAL FINANCIAL GROUP, LLC

Step 3

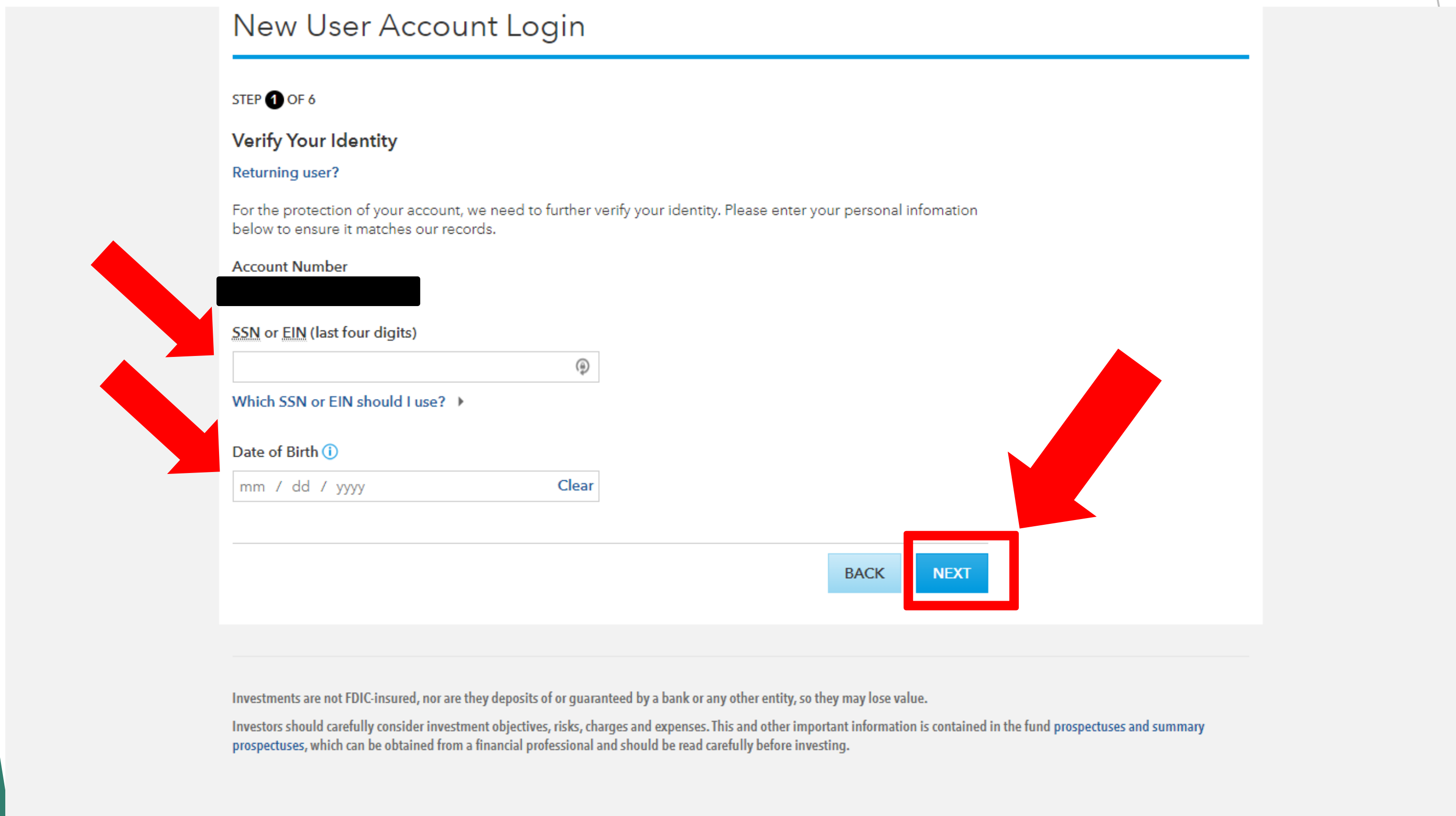
- After clicking New User that will take you to this screen where you need to enter your account.
- Once you enter the account, then click :Next”



CENTENNIAL
FINANCIAL GROUP, LLC

Step 4

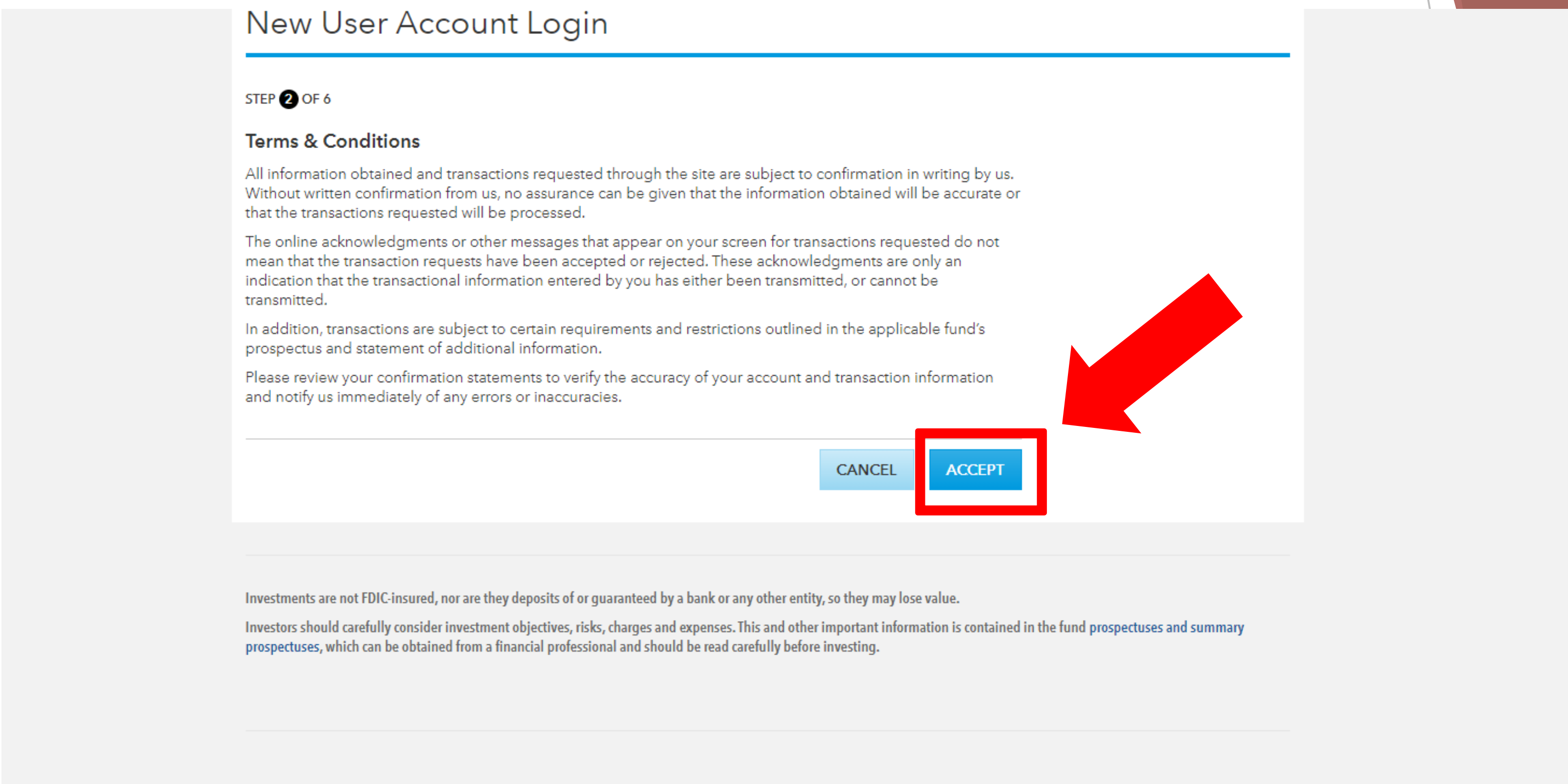
- That will bring you to this screen where you need to verify your account by typing in your SS# and DOB.
- Once done, then click “Next”



CENTENNIAL
FINANCIAL GROUP, LLC

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

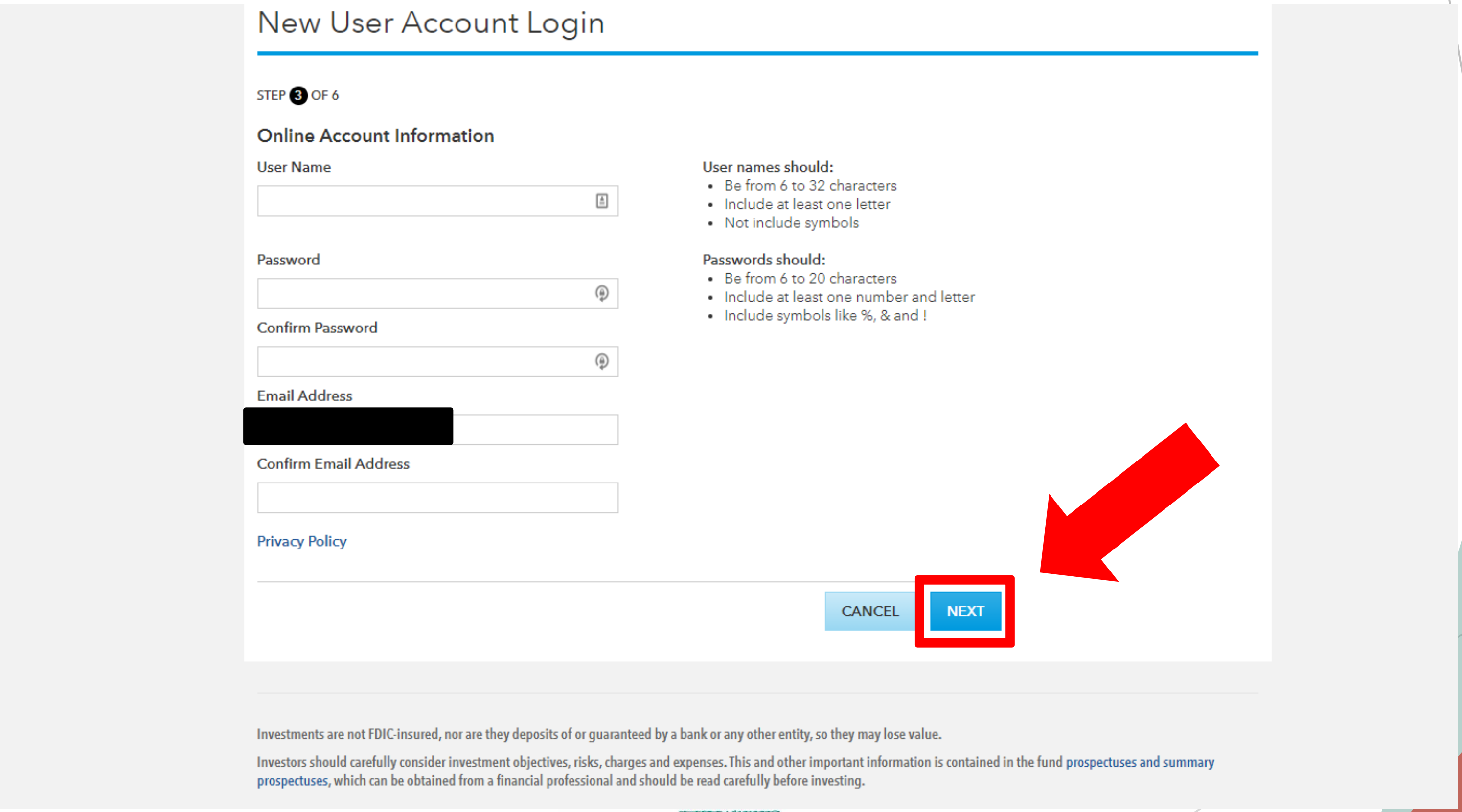
Investments are not FDIC-insured, nor are they deposits of or guaranteed by a bank or any other entity, so they may lose value.

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.

CENTENNIAL FINANCIAL GROUP, LLC

Step 6

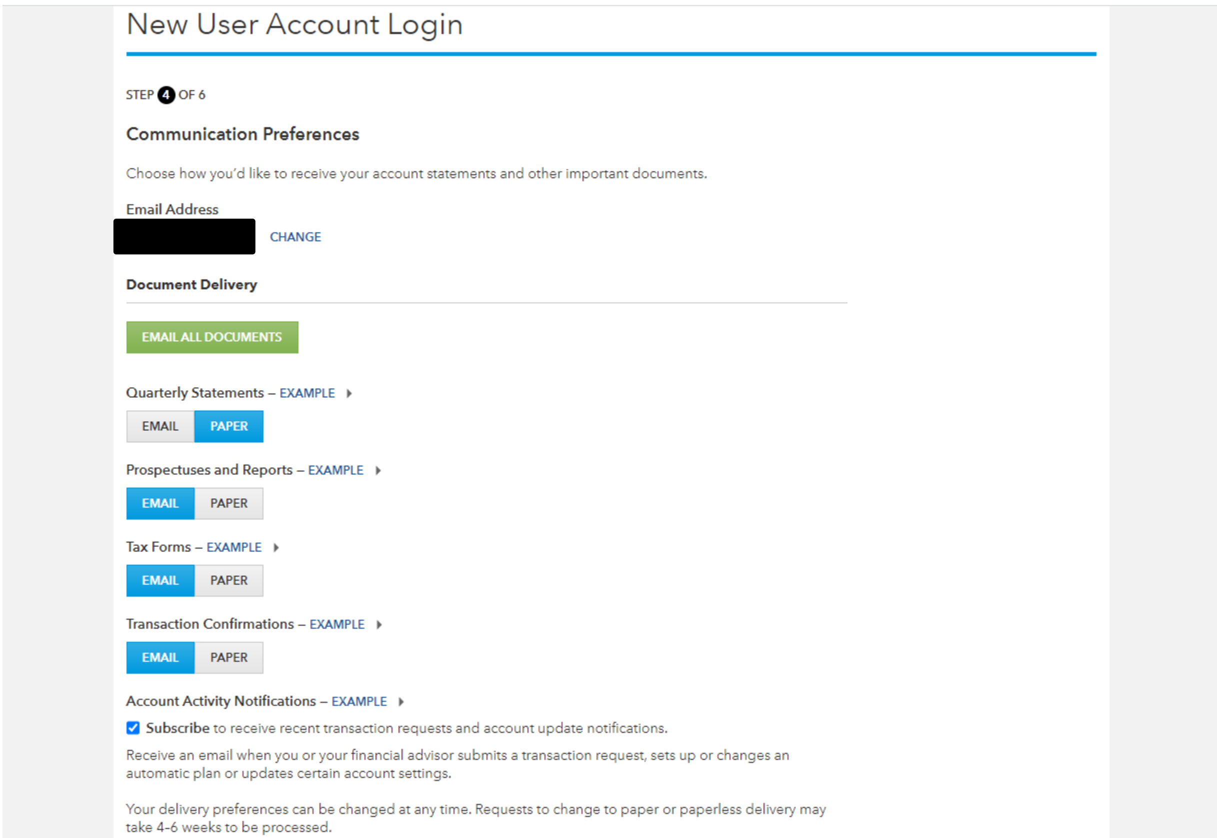
- You will then be taken to a screen to create an online account, then click "next."
- **NOTE: Keep track of this log in information because this is what you will need to access in the future.**



CENTENNIAL
FINANCIAL GROUP, LLC

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"



CENTENNIAL
FINANCIAL GROUP, LLC

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?

Centennial Financial Group, LLC

647 Main St. Suite 405

Johnstown, PA 15901

814-536-4200

team@centennialfg.com

http://www.centennialfinancialgroup.net/

CENTENNIAL
FINANCIAL GROUP, LLC