Fi360 and American Funds Recordkeeping Establish Integration Relationship

Pittsburgh, Pa. (February 16, 2017) – Fi360 announced today that its Fi360 Toolkit is now integrated with American Funds' recordkeeping business. The integration enables advisors to streamline their business processes by providing access to client data in the Fi360 Toolkit.

"Providing our clients with direct access to client data from within the Toolkit allows them to spend less time on manual processes and more time with their clients," said Fi360 CEO William Mueller.

The Fi360 Toolkit web-based software provides research, analytical, and reporting services for all client types, including high net worth individuals and families, endowments, trusts, plan sponsors, etc. Whether you're selecting new funds, monitoring an existing line up, or building client-friendly reports, the Fi360 Toolkit can help optimize and solidify your investment management process so you can spend more time winning new business.

"At American Funds, we are focused on retirement outcomes, and the Fi360 Toolkit helps advisors more efficiently address their clients' retirement needs," said Lorin Liesy, Director of Product Management for Retirement Plan Services at American Funds. "We are proud to have American Funds RecordkeeperDirect® and PlanPremier® solutions integrated within the Fi360 Toolkit."

The integration provides advisors with:

- Access to critical client data within the Fi360 Toolkit such as:
  - Account information
  - Balances
  - Positions
  - History
- Faster access for advisors to:
  - Add and update client investments for review
  - Flag investments for your watch list
  - Review and comment on watch list investments

For more information on the integration with American Funds, or the other companies Fi360 has integrated with, please contact Fi360 at (866) 390-5080 or sales@fi360.com.

About Fi360

Fi360's mission is to help financial intermediaries use prudent fiduciary practices to profitably gather, grow, and protect investors' assets. Fi360's capabilities include professional development, software applications, and research and practice management. Fi360 is the home of the AIF® designation and the Fi360 Toolkit, and is the parent company of Ann Schleck & Co., CEFEX, and IPS AdvisorPro. For more information about Fi360, please visit www.fi360.com.

About Capital Group

Since 1931, Capital Group, home of the American Funds, has been singularly focused on delivering superior results for long-term investors using high-conviction portfolios, rigorous research and

individual accountability. Today, Capital Group manages more than US$1.39 trillion in equity and fixed income assets for millions of individual and institutional investors around the world.*
The Capital Group companies manage equity assets through three investment groups. These groups make investment and proxy voting decisions independently. Fixed income investment professionals provide fixed income research and investment management across the Capital organization; however, for securities with equity characteristics, they act solely on behalf of one of the three equity investment groups.

* As of December 31, 2015

American Funds and Fi360 are separately owned and operated.

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Fi360
Fi360 helps financial intermediaries use prudent fiduciary practices to profitably gather, grow and protect investors' assets. Since 1999, the firm has provided financial professionals with the education, designations, training and tools necessary to act as a fiduciary in their work with investors. Headquartered in Pittsburgh, PA, Fi360 is the home of the Accredited Investment Fiduciary® (AIF®) designation, the Fiduciary Focus Toolkit™ and the Fi360 Fiduciary Score®. Fi360 is also the parent company of Ann Schleck & Co. and CEFEX. Learn more at www.fi360.com, via Twitter or on LinkedIn.