

# CollegeAmerica

## A benefit for your employees ... and you

Did you know you can offer a highly attractive employee benefit without creating any costs or administrative burden to your business?

An employer-sponsored CollegeAmerica® program makes it possible. Available in all 50 states, CollegeAmerica gives your employees access to a tax-advantaged higher education savings vehicle that can make a big difference in their families' futures.

Importantly, CollegeAmerica allows you to reward and retain employees with a program featuring:

- **No costs or recordkeeping expenses.** Employers face no setup costs and American Funds maintains all the employee account records.
- **No administrative burden.** Employees manage their accounts directly with American Funds.
- **No minimum participation.** While widespread employee participation is welcome, it is not required in order to establish and sustain a plan — a single shareholder is enough.
- **No sales charges for employees.** Employees are able to invest in CollegeAmerica without paying sales charges.

### Getting started: A one-page form

That's it. Once complete, you simply inform employees about the new benefit, offer them some program literature we provide and invite them to an enrollment meeting. Your financial professional will take it from there.

### The right relationship

By investing in CollegeAmerica, your employees will be investing in the American Funds, one of the nation's oldest, largest and most respected mutual fund groups. Just as you have carefully cultivated the trust of your employees, so has American Funds' risk-sensitive, research-driven approach earned the trust and loyalty of more than 50 million shareholders.

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

If you withdraw money from your CollegeAmerica account for purposes other than higher education, your earnings will be subject to federal income tax and possibly a 10% federal tax penalty. **Investors should carefully consider the investment objectives, risks, charges and expenses of the American Funds and CollegeAmerica. This and other important information is contained in each fund's summary prospectus and/or prospectus and the *CollegeAmerica Program Description*, which can be obtained from a financial professional and should be read carefully before investing. CollegeAmerica is distributed by American Funds Distributors®. Interests in CollegeAmerica are sold through unaffiliated intermediaries. Depending on your state of residence, there may be an in-state plan that provides tax and other benefits not available through CollegeAmerica.**



Use this form to authorize the establishment of a CollegeAmerica program for your employees. This form must be completed by an individual authorized to sign on behalf of the employer.

### 1 Employer information

Submit only one form per program. Please type or print clearly.

**Note:** A school district may not make available a CollegeAmerica program offering 529-E shares unless it:

1. appoints a single broker-dealer firm to service the district's CollegeAmerica Accounts **and**
2. allows on-site group employee enrollment meetings.

Name of employer \_\_\_\_\_

Employer Identification Number (EIN)   -

Mailing address \_\_\_\_\_

Phone ( ) \_\_\_\_\_ Ext. \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_ - \_\_\_\_\_

Fax ( ) \_\_\_\_\_

### 2 Employer contact

Name of contact \_\_\_\_\_ Title \_\_\_\_\_

E-mail address \_\_\_\_\_

Phone ( ) \_\_\_\_\_ Ext. \_\_\_\_\_

### 3 Financial adviser

This section must be completed by a financial adviser.

We authorize American Funds Service Company to act as our agent for accounts established by employees of the undersigned employer.

Name of adviser (exactly as it appears on firm's registration) \_\_\_\_\_ Adviser number \_\_\_\_\_ Branch number \_\_\_\_\_

Phone ( ) \_\_\_\_\_ Ext. \_\_\_\_\_

Adviser's branch address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_ - \_\_\_\_\_



Name of broker-dealer firm (as it appears on Selling Group Agreement) \_\_\_\_\_  Dealer's authorized signature

### 4 Signature of authorized employer

I hereby authorize the establishment of a CollegeAmerica program for employees of the employer designated in Section 1.

Name (print) \_\_\_\_\_ Title \_\_\_\_\_

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

Indiana Service Center	Virginia Service Center
<p><b>Please mail this form to the appropriate service center.</b></p> <p><i>(If you live outside the U.S., mail the form to the Indiana Service Center.)</i></p>  <p><b>American Funds Service Company</b> P.O. Box 6273 Indianapolis, IN 46206-6273</p> <p><b>Overnight mail address:</b> 12711 N. Meridian St. Carmel, IN 46032-9181</p>	 <p><b>American Funds Service Company</b> P.O. Box 2713 Norfolk, VA 23501-2713</p> <p><b>Overnight mail address:</b> 5300 Robin Hood Rd. Norfolk, VA 23513-2430</p>

If you have any questions or require more information, please contact your financial adviser or call American Funds Service Company at 800/421-0180. CollegeAmerica is sponsored by Virginia College Savings Plan<sup>SM</sup>