

As of March 31, 2024, the following mutual funds in the American Funds SIMPLE IRA Plus offering are approved by UBS for sale to clients¹:

Target date series

American Funds Target Date Retirement Series®

The target date series is composed of several funds with retirement dates in five-year increments.

Portfolio series

American Funds Global Growth PortfolioSM

American Funds Growth PortfolioSM

American Funds Growth and Income PortfolioSM

American Funds Moderate Growth and Income PortfolioSM

American Funds Conservative Growth and Income PortfolioSM

American Funds Preservation PortfolioSM

Retirement income portfolio series

American Funds Retirement Income Portfolio — EnhancedSM

American Funds Retirement Income Portfolio — ModerateSM

American Funds Retirement Income Portfolio — ConservativeSM

Growth

AMCAP Fund®

American Funds Global Insight FundSM

American Funds International Vantage FundSM

EuroPacific Growth Fund®

The Growth Fund of America®

The New Economy Fund®

New Perspective Fund®

New World Fund®

SMALLCAP World Fund®

Growth-and-income

American Funds Developing World Growth and Income FundSM

American Mutual Fund®

Capital World Growth and Income Fund®

Fundamental Investors®

International Growth and Income FundSM

The Investment Company of America®

Washington Mutual Investors FundSM

Equity-income

Capital Income Builder®

The Income Fund of America®

Balanced

American Balanced Fund®

American Funds Global Balanced FundSM

Bond

American Funds Corporate Bond Fund®

American Funds Emerging Markets Bond Fund®

American Funds Inflation Linked Bond Fund®

American Funds Mortgage Fund®

American Funds Multi-Sector Income FundSM

American Funds Strategic Bond FundSM

American High-Income Trust®

The Bond Fund of America®

Capital World Bond Fund®

Intermediate Bond Fund of America®

Short-Term Bond Fund of America®

U.S. Government Securities Fund®

The following mutual funds in the American Funds SIMPLE IRA Plus offering are not currently approved by UBS for sale to clients:

American Funds U.S. Government Money Market FundSM

¹ Mutual funds must go through a due diligence process to be approved by UBS for sale to clients. Certain mutual funds, including money market funds, are not included in this process. While you are free to choose funds that are not approved by UBS, we recommend you do so with the guidance of your own personal financial advisor. This list is updated at least quarterly.