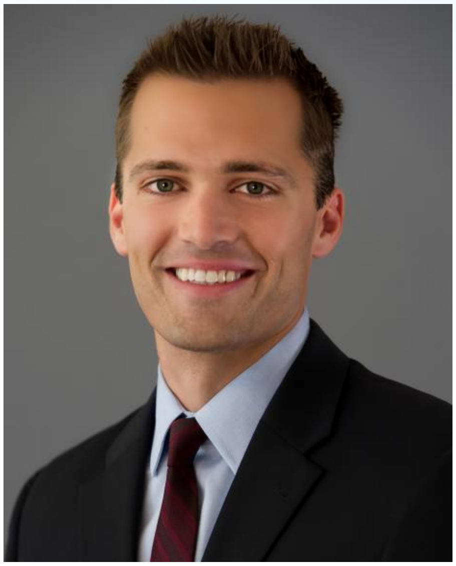
Robert G. Fernandez, CRPS
Senior Vice President
Corporate Retirement Director
Morgan Stanley, Wealth Management

Robert was born and raised in New York City, and he received his degree in Finance and Accounting from Queens College, Queens New York. Robert currently holds the Financial Planning Specialist designation and the Corporate Retirement Plan Specialist (CRPS) credential from the College of Financial Planning.

Robert started with Morgan Stanley in 1985, and his practice currently is focused on Wealth Management, Retirement Planning and Corporate 401(k)s. Morgan Stanley has a serious commitment to providing excellent service and advice in those areas, and Robert holds the title of Corporate Retirement Director, which is held by less than 2% of the around 16,000 Morgan Stanley advisors.

Robert believes that his greatest contribution to his clients is providing great advice, service and financial education.



Jordan Curry, CFP®
Vice President, Corporate Retirement Director
Morgan Stanley, Wealth Management

Jordan was born in Lexington, KY and raised in Phoenix, AZ. He received dual degrees in Finance and Marketing from the W.P. Carey School of Business at Arizona State University, he is also a graduate of the Barrett Honors College at ASU and currently holds the CERTIFIED FINANCIAL PLANNER™ designation and the Certified Plan Fiduciary Advisor (CPFA®) credential.

Jordan joined Morgan Stanley in 2009, rapidly expanding his group's 401(k) practice. He has broad knowledge of investment and fiduciary principles and utilizes the vast array of resources within Morgan Stanley to ensure that clients and their constituents have direct access to targeted and appropriate financial education. Jordan is a Corporate Retirement Director at Morgan Stanley, a title held by less than 2% of Morgan Stanley's 15,800 advisors. Philosophically, Jordan's aim is to provide value each day to each stakeholder – clients, colleagues, and family.

Jordan spends his free time with his wife, Britt and their son, Weston.

Jupiter, FL 33458 Registrar@TPSUniversity.com Phone: 1-855-755-4015

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Biography

Sue Walton

Sue Walton is a senior retirement strategist at Capital Group, home of American Funds. She has 24 years of industry experience and has been with Capital Group for six years. Prior to joining Capital, Sue was a director at Towers Watson Investment Services. Before that, she was an investment consultant at Mercer Investment Consulting and Ellwood Associates. She holds an MBA from DePaul University with a concentration in finance and a bachelor's degree in business administration, economics and international business from Marquette University. Sue is based in Chicago.