Principal®

We make keeping track of your life business easy!

Check out the following resources through advisors.principal.com to help you easily manage your business with us any time of the day.

Pending Business Report

Monitor the status of cases in underwriting or awaiting delivery.

Client Correspondence

View or print most of the correspondence sent to your clients regarding their life insurance policies.

Alerts

Get personalized alerts delivered right to your home page with details of recent client activities.

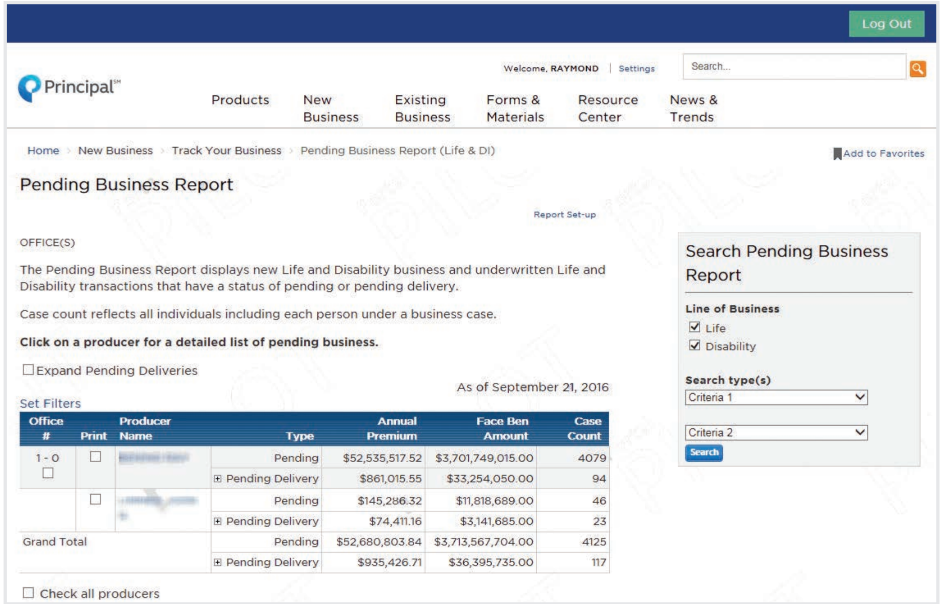
Subscription Services

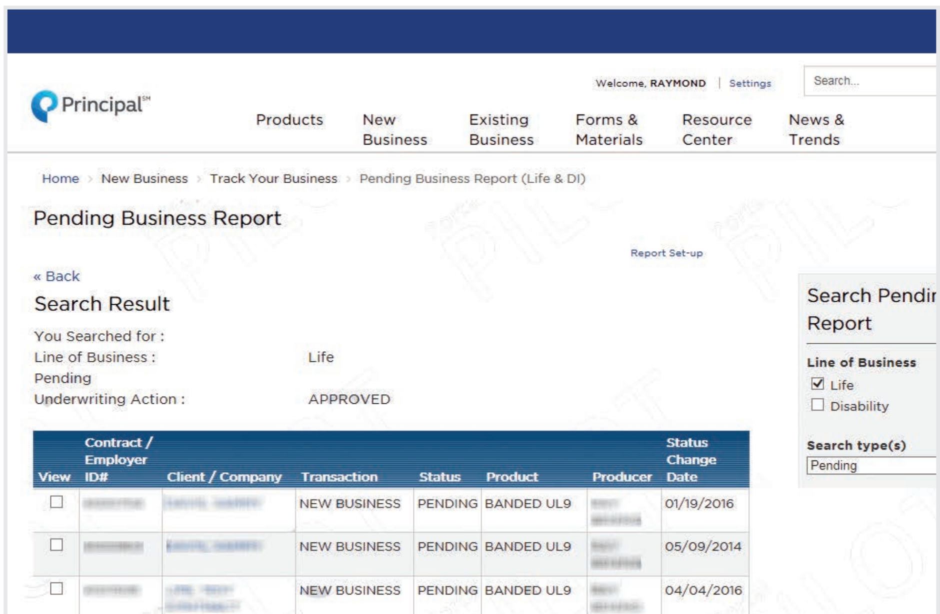
Sign up to receive email notification when certain correspondence has been sent to clients and is available for you to view online via the Client Correspondence Center. You can also set up delegate access for others to view alerts or receive emails on your behalf.

Pending Business Report

Need to find out if your case is pending, in underwriting or awaiting delivery? The Pending Business Report is updated several times a day and provides:

- Requirement status (pending, received, not received, waived) for various medical and financial information needed
- Your case coordinator and underwriter contact information
- Underwriting action (rating, offer details, etc.) for your case



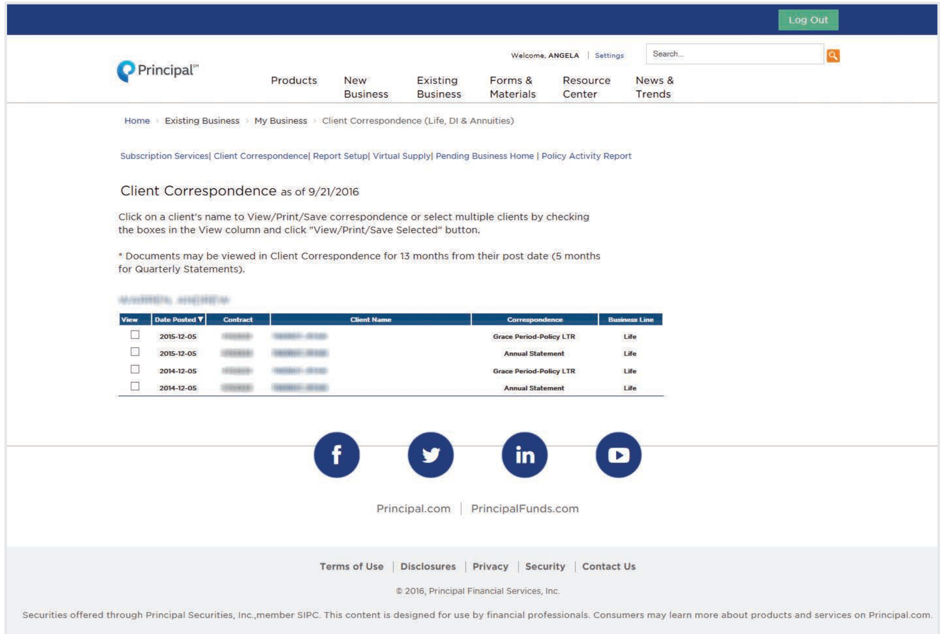


Tips when using the Pending Business Report

- **Customize your view** - Use filters such as line of business, product type, number of business days since application was coded and underwriting action.
- **Track pending premium** – Use the Pending Business Report to track how much pending premium is in the queue for the month.
- **Find the report** – The Pending Business Report can be found on the Advisor homepage under Key Business Tools.

Client Correspondence

Check the ongoing status of your client's insurance products by viewing our Client Correspondence Center. Included are annual statements, lapse letters and COL offers. At least 13 months of letters and statements are available.

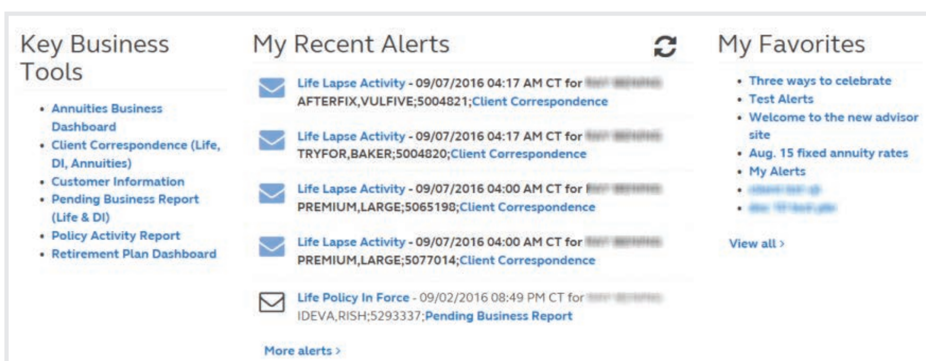


Tips when using Client Correspondence Center

- Select multiple documents by clicking the "View Selected" button to view all the documents.
- If you want to view one document, click on the client's name.
- Documents are stored as PDF files that can be printed for your file.
- Client correspondence can be found on the Advisor home page under Key Business Tools.

Alerts

Alerts can be delivered right to your home page after you log in. For example, you can receive an alert on your home page when your clients' policies are in danger of lapsing. It links directly to your client's letter.

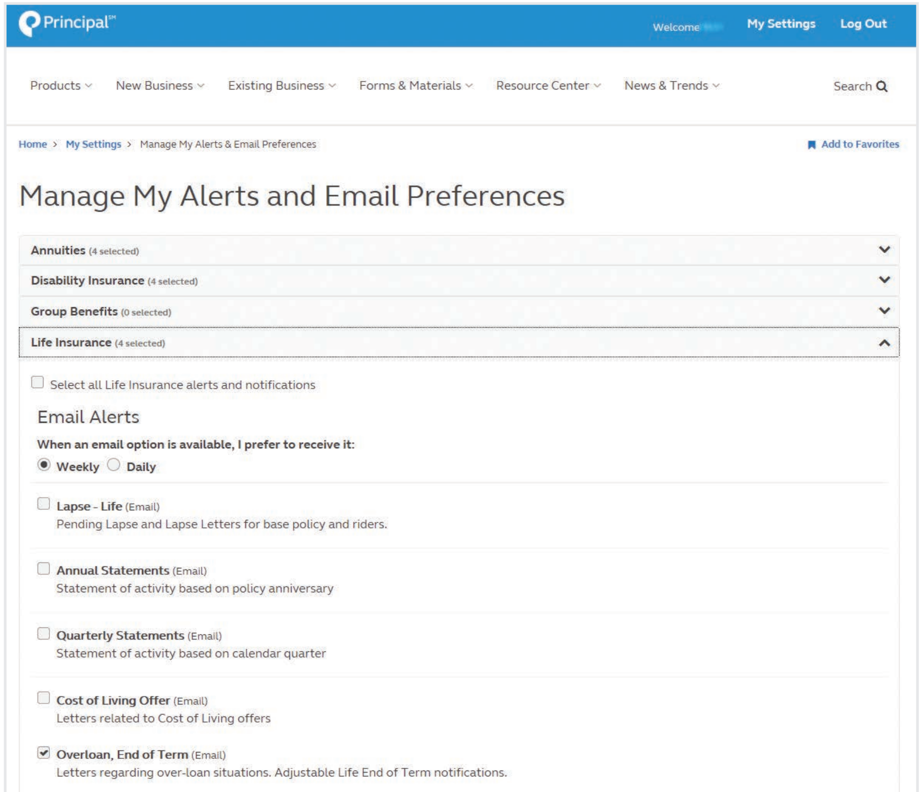


Subscription Services

Make managing your business even easier by customizing how you want to receive email notices or home page alerts. These initiate when correspondence has been sent to clients and is available online via the Client Correspondence Center.

Log in to the Advisor homepage and go to My Settings/Manage My Alerts & Email Preferences. You can choose:

- Type of correspondence (statements, lapse letters, COL offers, etc.)
- Email frequency (daily or weekly)
- Recipient (sent to you, your delegate[1] or both)



[1] Delegate access requires a username and password. Delegate access must be set-up by the financial representative.

Learn more

Contact the Distribution Technology Support Team at 800-544-3395, option 5, if you have any questions.

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