Financial professional appointment information sheet – group benefits

Principal Life Insurance Company
A member of Principal Financial Group®

Principal® utilizes just-in-time appointments. Please include appointment paperwork for **new** agent or agency profiles **with your submission of business**. State appointments for Group Benefits are processed when the agent or agency is added to new or existing business.

Notes:

- Review Principal Privacy Page.
- Please submit to your local sales office. Use the Office Directory Tool on the advisor website if you need assistance finding a sales office.
- Questions: Call Sales Compensation Administration at 800-388-4793.

Financial professional demographic information

Legal name ____________________ Preferred first name ____________________

SSN (required for new profiles) __________ NPN* __________ Date of birth (mm/dd/yyyy) __________ Gender: ☐ M ☐ F (optional)

Business physical address

Street __________ City __________ State ____ Zip ______

Business mailing address (if different)

Street __________ City __________ State ____ Zip ______

Personal address (no PO Box)

Street __________ City __________ State ____ Zip ______

Business phone number __________ Email address ____________________

Are commissions to be paid to the agency? ☐ Yes ☐ No

Agency name (include DBA if applicable) ____________________ Tax ID __________

Financial Professional policy correspondence address ____________________

Commission address (if different) ____________________

Email address for agency (must be non-individual email address) ____________________

If a new **agency** profile is being created, a main firm contact must be provided to manage online access. This must be an individual.

Name ____________________

Email address ____________________