

# 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 Gender: ☐ M ☐ F (optional)

SSN (required for new profiles) NPN\* Date of birth (mm/dd/yyyy)

### 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

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