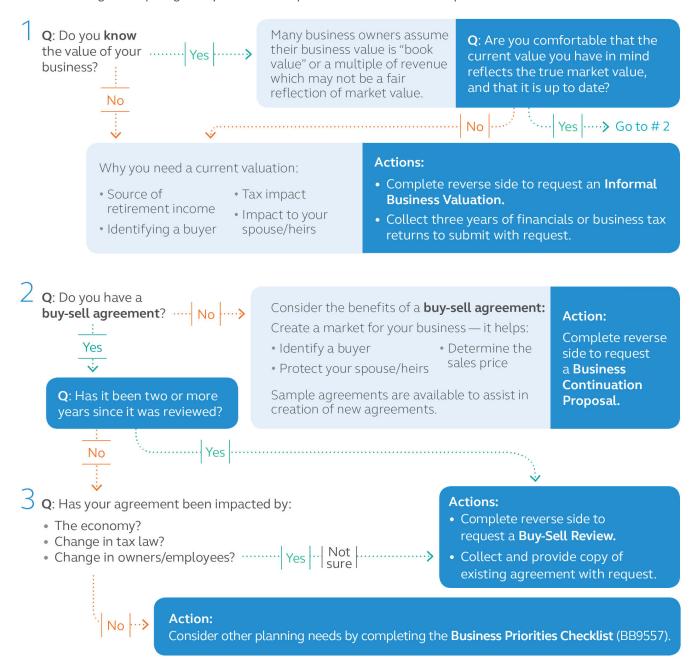


Could you benefit from our business planning services?

Requesting complimentary services from Principal® can be that first simple step to helping you secure your financial future. Not sure if taking this step is right for you? Take a couple minutes to answer these questions.



Ready to request services?

You need to know informal business valuations are not available for the following:

- Farms/ranches
- Real estate holding companies
- Businesses with commission as the primary revenue

- Companies with gross revenue of less than \$500,000
- Companies engaging in criminal activity
- Rental properties such as B&Bs and hotels
- Small real estate agencies

Gather this information and submit this form along with the most recent three years of financials.

Which proposal(s) are you requesting?	☐ Informal Business Valuation (see front for qualifications)
1. Business name:	Current estimated business value:
1a. Number of business owners:	7. Annual growth rate: %
1b. Owner(s): Name DOB Ownership %	8. If there is no written buy-sell agreement, to whom do
#1	you intend to sell?
#2 #3	☐ Third party ☐ Co-owner
#4	9. Names of the following professional advisers:
1c. Children of owners: Number in business	Attorney:
Outside of business	Accountant:
1d. Nature of business/industry:	10. Attach the most recent three years of income statements
1e. Headquarters – City, State:	and balance sheets, or three full years of company tax returns
1f. Issue state:	Producer and proposal delivery information
2. Total number of employees:	Proposals will NOT be provided without an indication of a valid Principal agency, or BGA office # and/or bank/wire relationship. 11. Principal agency/BGA office name and number:
3. Years the business has been operating?	
4. Do you have a buy-sell agreement? Yes No	12. Principal wholesaler
If yes, provide a copy of the agreement.	13. Advisor name:
Type of business entity and tax status:Corporation	☐ CFP® ☐ CLU® ☐ ChFC® ☐ LUTCF ☐ Other
Taxed as: C corporation S corporation	14. Advisor phone:
LLC	15. Advisor email:
Taxed as: Partnership C corporation S corporation	16. Bank/wire relationship:
☐ Partnership	17. Should anyone else (Producer or BGA) receive this proposal?
	Name:
Sole proprietorship (if submitting Schedule Cs, please include an informal balance sheet of business assets and liabilities)	Email address:

Submit your request

Financial professionals must submit form via email to newrfps@exchange.principal.com or fax to 866-946-3209.

From receipt of completed RFP and all necessary documents, please allow 5-7 business days for Proposals and up to 15-18 days for a Buy-Sell Review. **Questions** can be sent to **newrfps@exchange.principal.com** or call **833-803-8345.**

Principal National Life Insurance Company and Principal Life Insurance Company, Des Moines, Iowa 50392-0001, principal.com

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