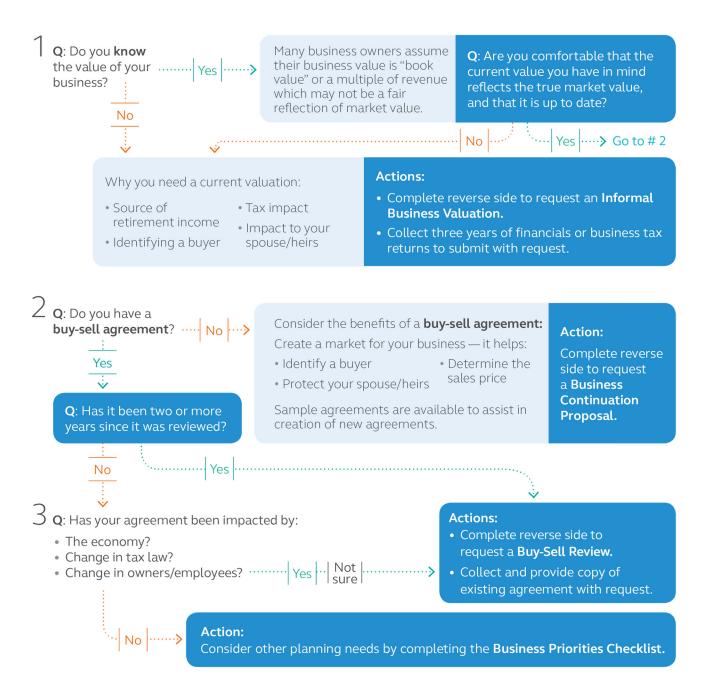


## Could you benefit from our business planning services?

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 guestions.



## Ready to request services?

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

- Farms/ranches
- Real estate holding companies
- Not-for-profit entities
- Financial services firms

- Publicly traded companies
- Companies with gross revenue of less than \$500,000
- Companies engaging in criminal activity

Gather this information and submit this form along with the most recent three years of financials. Which proposal(s) are you requesting? ☐ Buy-Sell Review ☐ Informal Business Valuation (see front for qualifications) 1. Business name: 5. Type of business entity and tax status: ☐ Corporation Taxed as: ☐ C corporation ☐ S corporation ☐ LLC 1b. Owner(s): Name DOB Ownership % ☐ Partnership ☐ C corporation Taxed as: #1 ☐ S corporation ☐ Partnership #4 ☐ Sole proprietorship (if submitting Schedule Cs, please include an informal balance sheet of 1c.Children of owners: Number in business business assets and liabilities) Outside of business 6. Current estimated business value: 1d. Nature of business/industry: 7. Annual growth rate: % 1e.Headquarters – City, State: 8. If there is no written buy-sell agreement, to whom do 1f. Issue state: you intend to sell? | Family ☐ Third party ☐ Co-owner 2. Total number of employees: 0-10 11-50 □ 51-100 □ 101-200 □ 201-1,000 □ 1,001+ 9. Names of the following professional advisers: 3. Years the business has been operating? Accountant: 4. Do you have a buy-sell agreement? ☐ Yes □ No If yes, provide a copy of the agreement. 10. Attach the most recent three years of income statements and balance sheets, or three full years of company tax returns Proposals will NOT be provided without an indication of a valid Principal agency, or BGA office # and/or bank/wire relationship. Required: Producer and proposal delivery information

Advisor name:	Principal wholesaler:
☐ CFP® ☐ CLU® ☐ ChFC® ☐ CEBS ☐ LUTCF	Advisor phone:
Other:	Advisor email:
Bank/wire relationship:	Should anyone else (Producer or BGA) receive this proposal?
Principal agency/BGA office name and number:	Name:
	Email address:
Submit form via email to newrfps@exchange princip	al com. From receipt of completed REP 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 800-654-4278 (ext. 55436 for Life or option 2, 2 for Disability). Principal National Life Insurance Company and Principal Life Insurance Company, Des Moines, Iowa 50392-0001, principal.com

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## Not FDIC or NCUA insured

May lose value • Not a deposit • No bank or credit union guarantee Not insured by any Federal government agency

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