

Manage your book of business online

Simple. Fast. Secure.

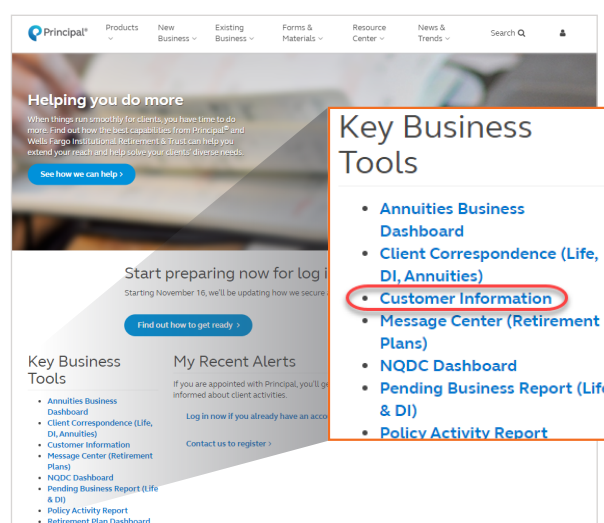
Managing your group customers' benefits with Principal® is easy. Go to advisors.principal.com to see all your clients with Principal, get details of each client's coverages, and manage your clients' benefits on their behalf.

Customer information

Need information about your clients who offer group dental, disability, life, vision, critical illness¹, or accident insurance? We've got your back. Simply log in to advisors.principal.com and go to **Customer Information**.

You can:

- › View a list of your customers.
- › Get detailed information about each client, like benefit summaries.
- › Find Principal contacts for sales, administration, and claims.



Your clients' benefits

You can easily answer questions about specific employees and do several transactions on your client's behalf²—without your client having to do a thing. You can:

- › Add and terminate members
- › Update salary
- › Make name and address changes
- › Order dental and vision ID cards
- › Track online transactions

And if clients want you to pay bills on their behalf, they just need to give you permission.

General group insurance information

You can rely on advisors.principal.com to get information that will help your business—without logging in:

- › Product information and news
- › Marketing materials
- › Group insurance forms

Compensation and recognition

Our programs reward you for your sales efforts with Principal. Find information on commissions, bonus, and recognition programs in one place. Simply log in to advisors.principal.com and go to the **Resource Center**.

➤ Keeping your account safe

Your information is important to us. That's why we use verification codes to prevent others from accessing your account, even if they have your password. The first time you log in—on Principal.com or the mobile app—you'll need to choose how you'll receive the codes. If you log in from an unrecognized device, forget your password, or we notice anything out of the ordinary, the codes help us confirm it's really you accessing your account.

➤ Give colleagues access

You can give others access to all or some of your accounts and decide the level of information each delegate can see. Log in to **advisors.principal.com** and go to **My Settings**.

Bonus: If you've sold customers other products and services from Principal, you can also view that. Use **advisors.principal.com** to get information for clients having retirement plans, nonqualified deferred plans, annuities, individual life insurance, or individual disability insurance.

¹ Specified disease in New York.

² Client must sign a consent form allowing you to manage members.

➤ Get started

Log in to **advisors.principal.com**. Need help?

- Call us at 800-554-3395 to get set up for the first time.
- Call us at 800-843-1371 for help using eService.



[principal.com](https://www.principal.com)

Insurance issued by Principal Life Insurance Company, Des Moines, Iowa 50392-0002

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GP50107-06 | 10/2019 | © 2018-2019 Principal Financial Services, Inc.