The Principal Financial Group®

eService – Making It Easier To Do Business

ANYTIME ADVISOR ACCESS TO ONLINE SOLUTIONS

Free with any Principal Life group insurance product, eService provides easy online access to the tools and information you and your clients need to manage Principal Life employee benefits – by employee name, contract number or employee ID. Plus, you can perform client support tasks, such as downloading a census or obtaining a customer list, and provide value-added service to your top clients by performing transactions on their behalf.

3 TYPES OF ACCESS OFFER A RANGE OF CAPABILITIES

1 | Principal eFinancial Professional gives you:

- Product information and news on Principal Life products
- Marketing materials to promote Principal Life products to your clients
- Customer information for all your accounts (including individual and retirement) with one password
- Group insurance forms and supplies to view or order
- Customer information for your group accounts, including:

✓ Contract names and numbers for quick client information
✓ Sales/service contact information
✓ Benefit summaries
✓ Renewal-letter dates
✓ Anniversary dates
✓ Rates

2 | eService automatic access offers client-specific information, including the ability to:

- Access online booklets/policies.
- Review billing and payment information.
- Order or print ID cards on clients' behalf.
- View reports for life and disability claims, and dental maximum accumulation.
- Elect features of eService for the account.
- View primary eService contacts and email addresses.
- Verify if an administrator has been assigned and agreements submitted.

3 | Your clients can grant you access so you can:

- Add new members or make member changes.
- Terminate members.
- Update salary information.
- Add or remove coverages or dependents.
- Set up and pay bills.

EMPLOYER ACCESS MAKES IT EASY TO MANAGE BENEFITS

Employers can also use eService to manage employee benefits. When your clients sign up for eService access, these are some of the functions they can perform:

- Add new members and make many member changes in real time.
- View all transaction history in the activity ledger.
- Access online booklets and policies.
- Order or print ID cards.
- Access a comprehensive library of forms.
- Access reports for life, disability and dental.
- View/download detailed billing statements.
- Pay premiums via electronic funds transfer (EFT).
- Access a summary of benefits.
- Order a preliminary bill to see how account changes will impact premium due.
- View eService tutorials.

TO LOG IN TO eSERVICE, visit **principal.com** and select **Advisor** from the **Account Login** box to the left. If you do not have access and are currently selling or servicing products from The Principal, please contact the sales office in your area to request access or for more information. They can also assist with fliers for employers and their employees.

FOR MORE INFORMATION

Contact your local sales representative today for more information about Principal Life eService or to order eService fliers.

Principal® Financial Group

WE'LL GIVE YOU AN EDGE®

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