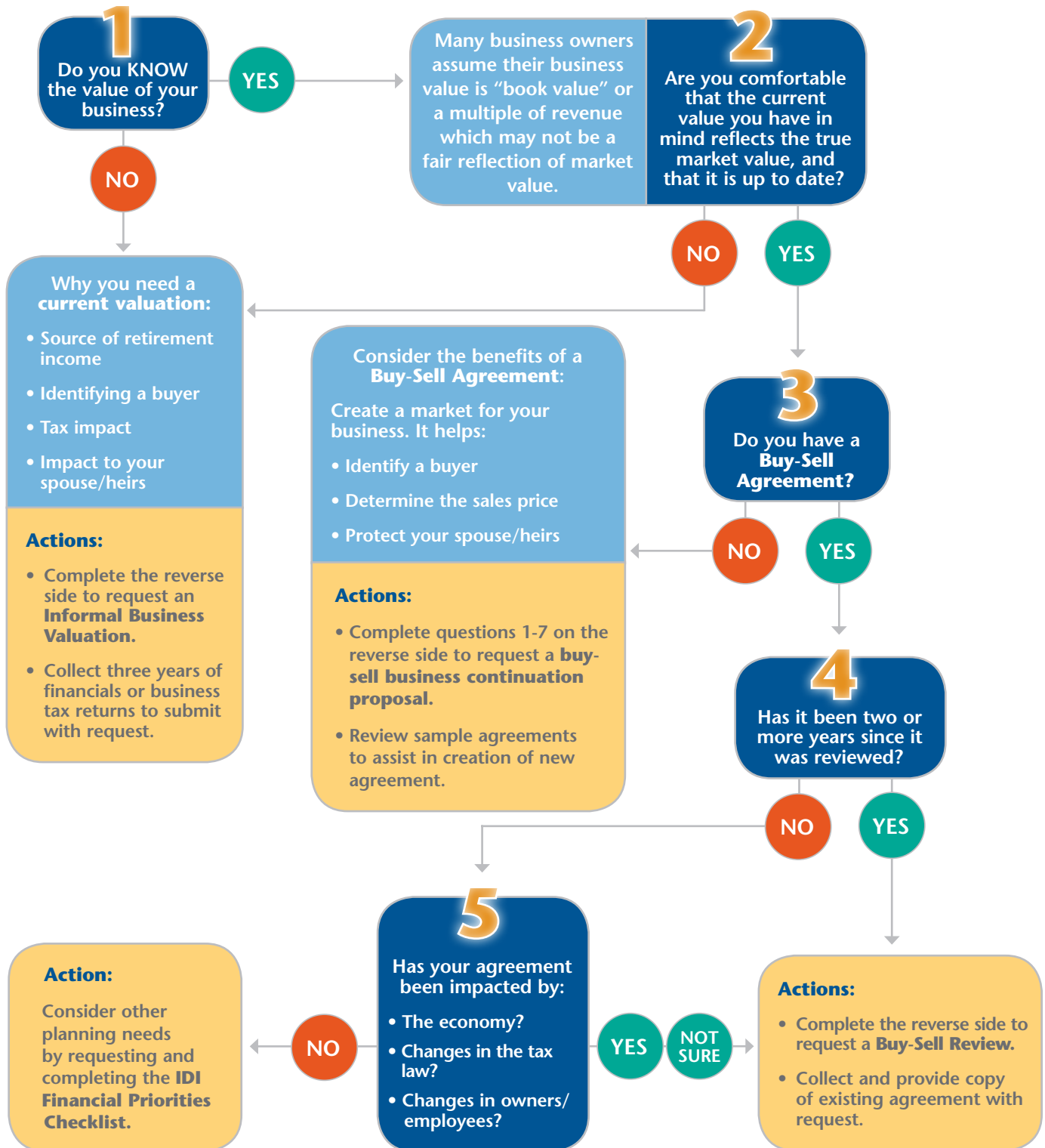


Protect Your Business. Help Secure Your Future.

Your business is your future. Principal Life Insurance Company offers complimentary business planning services that can help you protect your business and secure your future. By answering a few key questions, we can help you start the business planning process.



Individual Disability Insurance

Which proposal(s) are you requesting? Informal Business Valuation Buy-Sell Review Business Continuation Proposal

Complete the following:

1. Business name: _____
- 1a. Owner(s) name: _____
- 1b. City, state of company headquarters: _____
- 1c. Nature of your business: _____
- 1d. Years of business operation? _____
- 1e. Issue state: _____
2. Type of business entity:
 C corporation S corporation Other _____
 Sole proprietorship* Partnership _____
3. Number of business owners: 1 2 3 4+
4. Total number of employees:
 1-9 10-50 51-200 201-500 501+
5. Number of key employees (those critical to the success of the business): _____
6. Annual growth rate: _____%
7. Business tax rate (Enter owner's tax rate if business is taxed as a flow-through organization.): _____%
8. Do you have a buy-sell agreement? Yes No
If yes, provide a copy of the agreement.
9. To whom do you intend to sell?
 Family Key employee
 Third party Co-owner
10. Number of children: ____ in business; ____ out of business
11. Names and contact information for the following:
Attorney: _____
Accountant: _____
Banker: _____
12. Three full years of the most recent income statements and balance sheets*, or
 Three full years of the most recent company tax returns (included with RFP)

* Sole proprietorships: In addition to providing three years of Schedule Cs, also submit an informal balance sheet of business assets and

For financial professional use only. This section must be completed for processing to begin.

Proposals are NOT provided without a valid Principal Agency, Brokerage General Agency (BGA) and/or bank/wire relationship.

PRODUCER INFORMATION

Advisor name: _____

CFP CLU® ChFC® CEBS LUTCF Other: _____

Bank/wire relationship: _____

Principal Agency/BGA office: _____

IDI wholesaler: _____

PROPOSAL DELIVERY

Phone number: _____

Email address: _____

Should anyone else (Producer or BGA) receive this proposal?

Name: _____

Email address: _____

SUBMIT RFP

Email to newrfps@exchange.principal.com or fax to 866-946-3209.
(Include necessary documentation with submission; see question 12)

Timing: Allow 7-10 business days for turnaround time from receipt of RFP on all proposals (up to 15 days for a Buy-Sell review).

Questions? Contact your disability wholesaling team or the DI National Sales Desk at 800-654-4278, options 2, 2.



WE'LL GIVE YOU AN EDGE®

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

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Not a Deposit | Not FDIC Insured | Not Guaranteed by the Bank | May Lose Value | Not insured by any Federal Government Agency