



Jobina Rodriguez

Senior Internal Wholesaler - Nonqualified Plans

Great Lakes region - serving IL, IN, KY, MI, OH, and WI

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Who I am and how I can help you

In my role as a senior internal wholesaler with nonqualified deferred compensation plans, I support financial professionals and employers in the sales and service of these plans to organizations. The deferred comp benefits we provide to clients help them recruit, reward, and retain key employees. And research shows that both employers and key employees value this benefit for a variety of reasons.¹

I work closely with Brian Ellerman, regional vice president of nonqualified plans, to support financial professionals and their clients in the Great Lakes region. You can count on me to help with marketing, education, and setting up a deferred comp plan. I'll also work to simplify complex ideas and, with the financial professional, help put in place a solution to meet the employer's needs.

I've been with Principal® since 2007. In addition to having insurance licenses, I hold Series 6 and Series 63 securities registrations from the Financial Industry Regulatory Authority (FINRA). I live in Chicago, Illinois with my husband and daughter, and I enjoy traveling, photography, and spending time with family.

More about the company I work for

Principal is a leader in global investment management and retirement services with decades of experience and the No. 1 provider of nonqualified deferred comp plans². We help people and organizations around the world build, protect, and advance their financial well-being through retirement, insurance, and asset management solutions that fit their lives. Our employees are passionate about helping clients of all income and portfolio sizes achieve their goals—offering innovative ideas, investment experience, and real-life solutions to help make financial progress possible. To find out more, visit us at principal.com.

¹ 2023 Principal® Trends in Nonqualified Deferred Compensation report.

² Based on number of NQDC plans (excluding 457 plans), *PLANSponsor* Defined Contribution Recordkeeping Survey, July 2023.

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