

Put the “e” in easy for your clients.

Using Principal Life Online eDelivery can help simplify policy delivery. It allows you and your clients to receive and accept life insurance policies electronically.

How could this benefit you?



More satisfied clients. They can sign their policies when and where it works best for them.



Added convenience. No more mailing forms back and forth. No more difficult-to-schedule meetings. No separate website to log in to.



Greater efficiency. The process of getting final signatures and delivering policies can be expedited—giving you more time to meet the needs of your clients.



Faster coverage. Clients can get access to their policy and coverage sooner—resulting in a shorter time to policy issue and a quicker commission payment to you.

Fast facts

- Applicants must have a valid email address. When the owner and insured are different, a unique email should be provided for each. If they don't have a valid email address, the policy should be printed and signed.
- Cell phone numbers are recommended.
- Available in all states.
- Available for Principal Term life products.

Here's how it works.

Steps

Once a policy is issued, an email with a PDF copy of the policy is sent to the field office contact for review.

1

Then there's a choice of three options:

- Select the eSignature option for the owner/insured
- Print it out if a paper copy is preferred. Don't forget that the owner/insured will need to sign any delivery requirements, which will then need to be returned to Principal.
- Return it to the home office if something needs to be changed.

2

3

If the eSignature option is chosen, an email with a PDF copy of the policy will be sent to the insured, and then to the owner if different, to review and sign electronically.

4

Once the owner/insured provides an eSignature, the financial professional will receive an email with a PDF copy of the policy for review and an eSignature (if required).

5

All parties who provided an eSignature will receive an email with a PDF copy of the signed policy, which can be printed if desired.



Let's connect

Visit principal.com/PrincipalLifeOnline to learn more.

Call the National Sales Desk at 800-654-4278, or your Life RVP.

advisors.principal.com

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