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| **Principal® Bonus – S Owner or Principal Bonus – LLC Member**Request for proposal |

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| Which proposal are you requesting? [ ]  S Owner [ ]  LLC Member |
| Date: |       |  |  |
| Principal agency/BGA partner office name and number\*: |       |
| \*Proposals will not be provided without an indication of a valid Principal agency or BGA partner relationship. |

**Producer information**

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| --- | --- |
| Financial professional name and designations: |       |
| Financial professional name and designations: |       |
| **Principal wholesaler:** |       |

**Proposal delivery**

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| Phone number: | (    )       |
| Email address: |       |

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| Should anyone else (Producer or BGA) receive this proposal? If so, please provide: |
| Name: |       |
| Email address: |       |

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| **Please allow 5 business days from receipt of RFP on all proposals.****Questions** can be sent to newrfps@exchange.principal.com or **call** 833-803-8345.**Email RFP** tonewrfps@exchange.principal.com or **fax RFP** to Case Design Team, 866-946-3209. |

**Client information**

|  |  |  |  |
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| Business/organization name: |       | Issue state: |       |

**Census: S Owners / LLC members**(If greater than 5 owners, attach spreadsheet or send electronically.)

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|  | Name | Date of birth | Gender | Smokingstatus | Riskclass | Taxrate |
| \*[ ]  1. |       |       |       |       |       |      % |
| \*[ ]  2. |       |       |       |       |       |      % |
| \*[ ]  3. |       |       |       |       |       |      % |
| \*[ ]  4. |       |       |       |       |       |      % |
| \*[ ]  5. |       |       |       |       |       |      % |

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| \* Check box if individual illustration is desired for each participant. |

**Plan design**(If greater than 5 owners, attach spreadsheet or send electronically.)

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|  | Contribution amount | Faceamount | Retirement age | Years to receive income | Amount of retirement income | Funding |
| Product(VUL, IUL, UL) | Interest\*\* |
| 1. | $      | $      |       |       | $      |       |      % |
| 2. | $      | $      |       |       | $      |       |      % |
| 3. | $      | $      |       |       | $      |       |      % |
| 4. | $      | $      |       |       | $      |       |      % |
| 5. | $      | $      |       |       | $      |       |      % |

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| [ ]  Net\*\* [ ]  Gross\*\* |

**Notes**

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