

Life – Customer Completed Part B Routine Requirements

(All states **EXCEPT**: New York)

Amount	Age – Requirements are based on proposed insured's actual age when the application is signed.							
	0-17	18-30	31-40	41-49	50-54	55-60	61-69	70-90
\$5,000 to \$49,999	Non-Med	Non-Med	Non-Med	Non-Med	Urine Px. Meas.	Urine Px. Meas.	Blood/Urine Px. Meas.	Blood/Urine Px. Meas. MAQ
\$50,000 to \$250,000	Non-Med	Blood/Urine^ Px. Meas.^ H.O. MVR	Blood/Urine^ Px. Meas.^ H.O. MVR	Blood/Urine^ Px. Meas.^ H.O. MVR	Blood/Urine^ Px. Meas.^ H.O. MVR	Blood/Urine^ Px. Meas.^ H.O. MVR	Blood/Urine Px. Meas. H.O. MVR	Blood/Urine Px. Meas. MAQ APS H.O. MVR
\$250,001 to \$500,000	Non-Med	Blood/Urine^ Px. Meas.^ H.O. MVR	Blood/Urine^ Px. Meas.^ H.O. MVR	Blood/Urine^ Px. Meas.^ H.O. MVR	Blood/Urine^ Px. Meas.^ H.O. MVR	Blood/Urine^ Px. Meas.^ H.O. MVR	Blood/Urine Px. Meas. H.O. MVR	Blood/Urine Px. Meas. ECG MAQ APS H.O. MVR
\$500,001 to \$1,000,000	Non-Med	Blood/Urine^ Px. Meas.^ H.O. MVR	Blood/Urine^ Px. Meas.^ H.O. MVR	Blood/Urine^ Px. Meas.^ H.O. MVR	Blood/Urine^ Px. Meas.^ H.O. MVR	Blood/Urine^ Px. Meas.^ H.O. MVR	Blood/Urine Px. Meas. ECG H.O. MVR	Blood/Urine Px. Meas. ECG MAQ APS H.O. MVR
\$1,000,001 to \$2,500,000	Non-Med APS	Blood/Urine^ Px. Meas.^ H.O. MVR	Blood/Urine^ Px. Meas.^ H.O. MVR	Blood/Urine^ Px. Meas.^ H.O. MVR	Blood/Urine^ Px. Meas.^ H.O. MVR	Blood/Urine^ Px. Meas.^ APS^ H.O. MVR	Blood/Urine Px. Meas. ECG APS H.O. MVR	Blood/Urine Px. Meas. ECG MAQ APS FN Supp \$2M H.O. MVR
\$2,500,001 to \$3,000,000	Non-Med APS	Blood/Urine^ Px. Meas.^ APS^ H.O. MVR	Blood/Urine^ Px. Meas.^ APS^ H.O. MVR	Blood/Urine Px. Meas. APS H.O. MVR	Blood/Urine Px. Meas. APS H.O. MVR	Blood/Urine Px. Meas. APS H.O. MVR	Blood/Urine Px. Meas. ECG APS H.O. MVR	Blood/Urine Px. Meas. ECG MAQ APS FN Supp H.O. MVR H.O. EIR
\$3,000,001 to \$5,000,000	Non-Med APS FN Supp \$5M	Blood/Urine Px. Meas. APS FN Supp \$5M H.O. MVR	Blood/Urine Px. Meas. APS FN Supp \$5M H.O. MVR	Blood/Urine Px. Meas. APS FN Supp \$5M H.O. MVR	Blood/Urine Px. Meas. APS FN Supp \$5M H.O. MVR	Blood/Urine Px. Meas. APS FN Supp \$5M H.O. MVR	Blood/Urine Px. Meas. ECG APS FN Supp \$5M H.O. MVR	Blood/Urine Px. Meas. ECG MAQ APS FN Supp H.O. MVR H.O. EIR
\$5,000,001 to \$10,000,000	APS FN Supp H.O. EIR	Blood/Urine Px. Meas. APS FN Supp H.O. MVR H.O. EIR	Blood/Urine Px. Meas. APS FN Supp H.O. MVR H.O. EIR	Blood/Urine Px. Meas. APS FN Supp H.O. MVR H.O. EIR	Blood/Urine Px. Meas. ECG APS FN Supp H.O. MVR H.O. EIR	Blood/Urine Px. Meas. ECG APS FN Supp H.O. MVR H.O. EIR	Blood/Urine Px. Meas. ECG APS FN Supp H.O. MVR H.O. EIR	Blood/Urine Px. Meas. ECG MAQ APS FN Supp Financials H.O. MVR H.O. EIR
\$10,000,001 and up	APS FN Supp Financials H.O. EIR	Blood/Urine Px. Meas. APS FN Supp Financials H.O. MVR H.O. EIR	Blood/Urine Px. Meas. APS FN Supp Financials H.O. MVR H.O. EIR	Blood/Urine Px. Meas. ECG APS FN Supp Financials H.O. MVR H.O. EIR	Blood/Urine Px. Meas. ECG APS FN Supp Financials H.O. MVR H.O. EIR	Blood/Urine Px. Meas. ECG APS FN Supp Financials H.O. MVR H.O. EIR	Blood/Urine Px. Meas. ECG APS FN Supp Financials H.O. MVR H.O. EIR	Blood/Urine Px. Meas. ECG MAQ APS FN Supp Financials H.O. MVR H.O. EIR

^ These studies are not required for applicants requesting Accelerated Underwriting. They may be requested should Underwriting determine the applicant is ineligible.

Customer Completed Part B

Completed by the proposed insured online or by phone.

Amount

For single-life products, add together face amounts issued and applied for with Principal® within the last 6 months to determine amount.

For survivorship products, medical and MVR requirements are based on half of the total face amount for each proposed insured. Electronic inspection reports and financial requirements are based on the total face amount applied for.

For any amount, the underwriter may request additional requirements for cause.

Length of Studies

Physical Measurements, mature age questionnaires, blood profiles, and urine specimens are valid for 365 days from completion for ages 0-69, 180 days for ages 70 and above.

ECGs, financials, financial underwriting supplements, MVRs and inspection reports are valid for 365 days.

Applications/Part Bs are valid for 180 days subject to underwriting review.

Underwriting may request updated requirements for cause.

Legend

APS	Attending Physician Statement
Blood/Urine	Blood and urine specimen
ECG	Electrocardiogram
H.O. EIR	Electronic Inspection Report ordered by the Home Office
Financials	3 rd Party Financial Documentation
FN Supp	Financial Underwriting Supplement if purpose of insurance is personal
FN Supp \$2M	At \$2,000,000, FN Supp required if purpose of insurance is personal
FN Supp \$5M	At \$5,000,000, FN Supp required if purpose of insurance is personal
MAQ	Mature Age Questionnaire completed by examiner
H.O. MVR	Motor Vehicle Report ordered by the Home Office
Non-Med	No routine requirements needed
Px. Meas.	Physical Measurements (height, weight, blood pressure and pulse)
Urine	Urine Specimen

Part B Request Form (login required) or Toll-Free Number: 1-888-835-3277



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