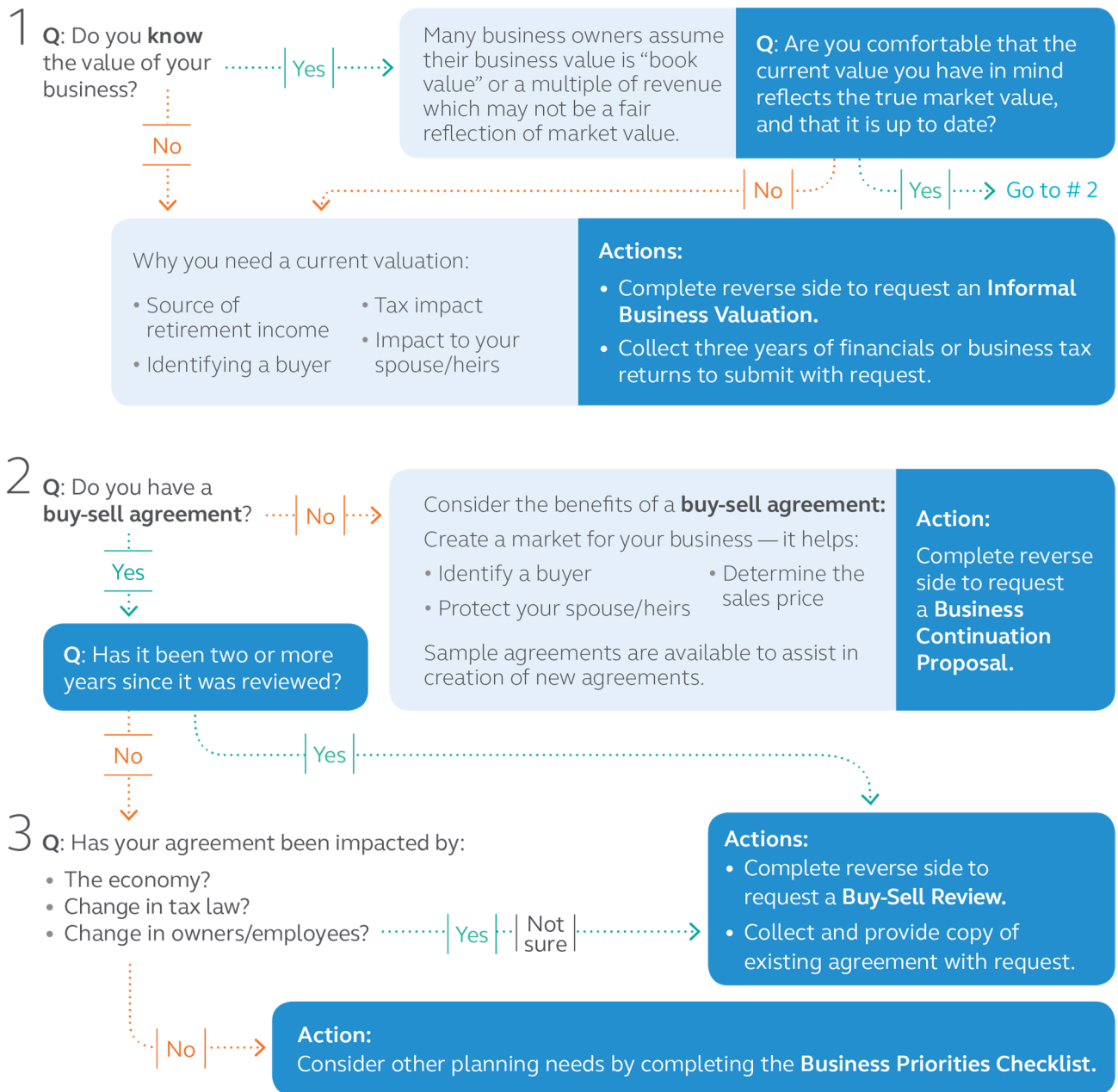


Could you benefit from our business planning services?

Requesting complimentary services from Principal® can be that first simple step to helping you secure your financial future. Not sure if taking this step is right for you? Take a couple minutes to answer these questions.



Ready to request services?

You need to know informal business valuations are not available for the following:

- Farms/ranches
- Real estate holding companies
- Not-for-profit entities
- Financial services firms
- Publicly traded companies
- Companies with gross revenue of less than \$500,000
- Companies engaging in criminal activity

Gather this information and submit this form along with the most recent **three years of financials**.

Which proposal(s) are you requesting? Buy-Sell Review Informal Business Valuation (see front for qualifications)

1. Business name: _____

1a. Number of business owners: 1 2 3 4+

1b. Owner(s): Name _____ DOB _____ Ownership % _____
#1 _____

#2 _____

#3 _____

#4 _____

1c. Children of owners: Number in business _____
Outside of business _____

1d. Nature of business/industry: _____

1e. Headquarters – City, State: _____

1f. Issue state: _____

2. Total number of employees: 0-10 11-50
 51-100 101-200 201-1,000 1,001+

3. Years the business has been operating? _____

4. Do you have a buy-sell agreement? Yes No
If yes, provide a copy of the agreement.

5. Type of business entity and tax status:

Corporation

Taxed as: C corporation S corporation

LLC

Taxed as: Partnership C corporation

S corporation

Partnership

Sole proprietorship

(if submitting Schedule Cs, please include an informal balance sheet of business assets and liabilities)

6. Current estimated business value: _____

7. Annual growth rate: _____ %

8. If there is no written buy-sell agreement, to whom do you intend to sell? Family Key employee
 Third party Co-owner

9. Names of the following professional advisers:

Attorney: _____

Accountant: _____

10. Attach the most recent three years of income statements and balance sheets, or three full years of company tax returns

Proposals will NOT be provided without an indication of a valid Principal agency, or BGA office # and/or bank/wire relationship.

Required: Producer and proposal delivery information

Advisor name: _____

CFP® CLU® ChFC® CEBS LUTCF

Other: _____

Bank/wire relationship: _____

Principal agency/BGA office name and number: _____

Principal wholesaler: _____

Advisor phone: _____

Advisor email: _____

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

Name: _____

Email address: _____

Financial professionals must submit form via email to newrfps@exchange.principal.com.

From receipt of completed RFP and all necessary documents, please allow 5-7 business days for Proposals and up to 15-18 days for a Buy-Sell Review.

Questions can be sent to newrfps@exchange.principal.com or call **800-654-4278 (ext. 55436 for Life or option 2, 2 for Disability)**.

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

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Not insured by any Federal government agency**

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