



## Lori Simpson

**Regional Vice President - Nonqualified Plans**

Northeast region - serving CT, MA, ME, NH, upstate NY, RI, and VT

Phone: 610-688-5105, x 3301

Email: [simpson.lori.m@principal.com](mailto:simpson.lori.m@principal.com)

### Who I am and how I can help you

In my role as a regional vice president-nonqualified plans, I support financial professionals and employers in the sale and service of nonqualified deferred compensation plans to organizations of all types and sizes. The deferred comp benefits we provide to clients help them recruit, reward, retain, and retire key employees. And research shows that both employers and key employees value this benefit for a variety of reasons.<sup>1</sup>

I can help with plan design, financial analysis, implementation, and delivery of deferred comp solutions. I'll work to simplify complex ideas and, with the financial professional, help put in place a solution to meet the employer's needs. My senior internal wholesaler, Cory Albrecht, and I provide support to financial professionals and their clients in the Northeast region.

I've been with Principal<sup>®</sup> since 2007. I hold Series 6 and 63 securities registrations from the Financial Industry Regulatory Authority (FINRA). I also have a bachelor's degree in marketing from La Salle University in Philadelphia, Pennsylvania. I live in Philadelphia and enjoy traveling, running, spending time with family and friends, and cheering on my home teams, the Philadelphia Eagles and Phillies.

### 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 plans<sup>2</sup>. 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](https://principal.com).

<sup>1</sup> 2023 Principal<sup>®</sup> Trends in Nonqualified Deferred Compensation report.

<sup>2</sup> Based on number of NQDC plans (excluding 457 plans), *PLANSPPONSOR* Defined Contribution Recordkeeping Survey, July 2023.

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