



Principal® Life Online — Application Part B

Put this innovative new process to work for your clients

Principal Life Online is a big change in the way we do business. And now we're kicking off one of its most exciting features: **Your clients will be able to complete Part B of their applications for all products and face amounts online!**



What does this mean for you?



Potential for more detailed client information, since they'll be entering it themselves.



More flexibility and convenience for clients, who get to apply on their own time.



Less hassle. No more missed calls. No more rescheduling appointments. So you'll be free to find the best solutions that fit your clients' needs.

Fast facts

- Applicants must have a valid email address.
- Approved in all states.
- Available for all Principal life products.
- No face amount restrictions.
- Client must speak and understand English.
- Not available for individual disability insurance cases including Life/IDI applications.

Here's how it works

Steps

Meet with your client and prepare to **submit the life insurance application.**

1

To use online Part B, notify Principal via:

eApp — Select “Yes” TeleApp scheduled, then in the confirmation line add “Online.”	Paper app — Comment “Online Part B” on the cover letter or on the Producer Report.
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Initiate the client email that contains the online link using the Part B Request Form.

2

You can also initiate the email link by calling the TeleApp Contact Center at 888-835-3277, main option 1, sub option 4.

3

Once we receive the notification, our system will automatically send the client an email with the online Part B link.

- Follow-up reminder emails will be sent to clients at 5 and 10 days (field office contacts originally listed on the application/Part B Request Form will also receive copies of the reminder emails).
- If the online Part B isn't complete within 30 days, the link will expire.
- **Once your client has completed online Part B and the rest of the application has been received, the field office contact that was provided on the application will receive an email with a copy of the completed Part B attached.**

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Principal TeleApp Contact Center is available to help answer questions you and your clients might have. Call us at 888-835-3277, main option 1, sub option 4.

TeleApp Contact Center hours:
 Monday-Thursday, 7 a.m.-10 p.m. CT
 Friday, 7 a.m.-7 p.m. CT



Visit principal.com/PrincipalLifeOnline to learn more.
 Call the National Sales Desk at 800-654-4278, or your Life RVP.

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