



Principal® Life Online — application Part B

Put this innovative process to work for your clients

Principal Life Online offers a faster, easier way to do business. And a key part of it is our easy-to-use feature that allows your clients to **complete Part B of their applications for all life insurance 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 or 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, and read, speak, and understand English.
- Approved in all states.
- Available for all Principal life products with no face amount restrictions.
- Available for life/individual disability insurance combo cases (except in CA and NY).

Here's how it works

Steps

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

1

Initiate the client email that contains the online link using the Part B Request Form.

2

3

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

- Reminder emails will be sent to clients at 5 and 10 days (field office contacts listed on the application/Part B Request Form will also receive copies of the reminder emails).
- If the online Part B isn't completed within 30 days, the link will expire.
- Once your client has completed online Part B, they'll receive an email link to eSign the document.
- After the client has eSigned the Part B and we've received the rest of the application, a copy will be stored on Principal.com under "Client Correspondence."

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

TeleApp Contact Center hours:
Monday - Friday, 7 a.m. - 6 p.m. CT



Let's connect

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



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