



Individual Life Insurance  
711 High Street  
Des Moines, IA 50392

# Summary annual report

As of 12/31/20XX  
Prepared on 01/03/20XX

JOHN DOE  
ACME PRODUCTS  
123 MAIN STREET  
DES MOINES IA 50315

**Employer number:** 1234567  
**Program:** Loan Split Dollar  
**Case number:** 01  
**Total policy count:** 02

## Program summary

	Premium paid YTD	Annualized premium	Net surrender value	Net death benefit
Insured name: Participant, Steve Policy number: 1111111 <sup>1</sup>	\$1,111.11	\$1,111.11	\$1,111.11	\$111,111.11
Insured name: Participant, Jill Policy number: 2222222 <sup>1</sup>	\$2,222.22	\$2,222.22	\$2,222.22	\$222,222.22
<b>TOTAL</b>	<b>\$3,333.33</b>	<b>\$3,333.33</b>	<b>\$3,333.33</b>	<b>\$333,333.33</b>

- Policy Number field above denotes issuing company:  
  - <sup>1</sup>Principal Life Insurance Company
  - <sup>2</sup>Principal National Life Insurance Company
- Note: This report is being provided based on our understanding that all required legal documents pertaining to this business program have been completed.
- Net Surrender Values and Net Death Benefits include any unused premiums and reflect any reductions due to policy loans, if applicable.
- Note: It is important to periodically review the Key Executive insurance program to ensure that the business is still adequately protected against the loss of a key employee's services. Contact your representative for assistance.

## Contact us

**For additional information regarding this report, please contact:**

**Your Financial Representative**

Joe Producer, CLU, ChFC  
999.999.9999

**Executive Benefits Administrator**

Brad D Baack  
Executive Benefits Administrator  
800.247.9988 EXT 56434  
baack.brad@principal.com

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Employer number: 1234567

Case number: 01

## Program values report

(valuation period 12/31/20XX - 12/31/20XX)

	<b>Beginning value</b>	<b>YTD value change</b>	<b>Total value</b>	<b>Loan principal</b>	<b>Loan interest</b>	<b>Total indebtedness</b>	<b>Surrender charge</b>	<b>Net surrender value</b>
Insured name: Participant, Steve Policy number: 1111111	\$0.00	\$1,111.11	\$1,111.11	\$0.00	\$0.00	\$0.00	\$0.00	\$1,111.11
Insured name: Participant, Jill Policy number: 4075610	\$0.00	\$2,222.22	\$2,222.22	\$0.00	\$0.00	\$0.00	\$0.00	\$2,222.22
<b>TOTAL</b>	\$0.00	\$3,333.33	\$3,333.33	\$0.00	\$0.00	\$0.00	\$0.00	\$3,333.33

- Term Life Insurance Policies would not be reflected on this report since they do not accumulate value.

Insurance products are issued by Principal National Life Insurance Company (except in New York) and Principal Life Insurance Company®, and the companies available through the Preferred Product Network, Inc. Plan administrative services provided by Principal Life. Securities offered through Principal Securities, Inc., member SIPC. Referenced companies are members of the Principal Financial Group®, Des Moines, IA 50392 3977919-102024