

All this and more

Core services, plus more options to choose from.

A long list of onboarding and core services make the plan a valuable tool to recruit, retain, reward, and retire your key employees. And if you want even more, that's no problem. You can tailor your plan with optional services for an additional fee.

ONBOARDING SERVICES

Our team collaborates with you and your financial professional to provide services included in the plan onboarding fee.

- Dedicated project manager
- Initial consultation
- Model plan documents available
- Participant enrollment and election materials available (if using model plan documents)
- Data collection coordination
- Financing strategy implementation and reporting
- Benefit calculation set-up and validation
- Single location plan set-up
- Underwrite variable universal life products
- Mutual funds account set-up

CORE SERVICES

For you, the plan sponsor.
All-inclusive plan features are automatically included in the annual plan fee.

Ongoing services

- Toll-free plan assistance
- Single location recordkeeping
- Record of participant beneficiary designations
- Record of participant distribution elections

Asset services

- Deposit processing
- Daily valuation
- Quarterly and annual reporting
- Annual gain/loss reporting (mutual funds)
- Rebalancing
- Liquidations
- Annual review (not applicable if unfinanced)

Online information

- Plan documents and plan summary
- Investments
- Technical articles
- Regulatory and legislative links
- Asset summary
- Financing history
- Service Organization Control 1 and 2 (SOC1 and SOC2) reports



OPTIONAL SERVICES

For you, the plan sponsor.

Customize your plan with these a la carte options for an additional fee. Optional services will need to be discussed and approved before implementation.

Asset services

- Paper check asset deposits
- Non-standard asset recordkeeping
- More frequent than annual asset gain/loss reporting (mutual funds)
- More frequent than quarterly asset reporting
- Customizations to the core services

Ongoing services

- Benefit calculation services and online participant benefit statements
- Annual accounting disclosure report
- Financing analysis and report
- Multiple location plan set-up and recordkeeping
- Services outside of core plan onboarding
- Plan set-up outside of core services
- Consulting services outside core services
- Rabbi Trust services (provided by Principal Trust CompanySM)
- Distribution and tax reporting services for separated participants (provided by Principal Trust CompanySM)
- Customizations to the core services

 [Learn more](#)

Contact your financial professional.



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