

## Principal® Total Retirement Solutions

# Retirement expertise that helps drive employee outcomes across multiple plans.

Bringing innovative tools, resources, and best-in-class service and support to help you manage a strong retirement program.

Principal® Total Retirement Solutions helps you streamline your retirement plans.

As a single service provider, we offer comprehensive solutions for:

**Defined contribution**

**Pension solutions**

**Nonqualified deferred compensation**

**Stock plans**

**Trust and custody**

## Discover the power of ONE

### Participant experience

One call for plan service needs

One mobile app to view plan info

One consolidated account view

One education approach

One financial wellness resource

### Plan sponsor experience

One experienced relationship manager

One digital platform

One holistic view of their retirement plans

One provider to submit plan data

One provider to monitor as a fiduciary

One provider is in reference to the plan recordkeeper or if applicable, pooled plan provider. If you delegate to other providers such as a 3(38), you'll need to monitor as well.

Intended for financial professional and plan sponsor use.

# Why Principal®?

## It comes down to experience.

Our proven approach can simplify your experience and provide your employees with tools and resources to help them achieve their financial goals.



## Strength in numbers

**Top 3** defined contribution recordkeeper<sup>1</sup>

**#1** employee stock ownership plan<sup>2</sup>

**#1** defined benefit recordkeeper<sup>3</sup>

**#1** nonqualified deferred compensation<sup>4</sup>

**Top 4** pension risk transfer provider<sup>5</sup>

**Over \$900B** in safeguarded trust and custody assets<sup>6</sup>



<sup>1</sup> Top 3 defined contribution provider by number of participants, according to the annual PLANSPONSOR Recordkeeping Survey, July 2022.

<sup>2</sup> No. 1 ESOP provider by number of plans, according to the annual PLANSPONSOR Recordkeeping survey, July 2022.

<sup>3</sup> No. 1 defined benefit recordkeeper by number of plans. Source: PLANSPONSOR Defined Benefit Administration Survey May 2021.

<sup>4</sup> No. 1 nonqualified provider based on total number of Section 409A plans. PLANSPONSOR Recordkeeping survey, July 2022.

<sup>5</sup> No. 4 Pension risk transfer provider. Based on total PRT assets, LIMRA Secure Retirement Institute, as of Dec. 31, 2022.

<sup>6</sup> Over \$900B in safeguarded trust and custody assets. Principal Financial Group, Dec. 31, 2022.

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