



**Principal Funds**  
 PO Box 8024  
 Boston, MA 02266-8024

**Overnight Mail:**  
 30 Dan Road  
 Canton, MA 02021-2809

800-222-5852  
 PrincipalFunds.com

**Direct Deposit Authorization Form**

To establish a Direct Deposit Plan with Principal Funds, please complete the following information and review the instructions at the bottom of the form. The Plan allows you to automatically deposit all or part of your paycheck to your Principal Funds account. Before completing this form, check with your payroll department regarding the availability of this service to you. Please type or print clearly.

I authorize my employer or designated government agency to make

Salary     Social Security     Government Agency     Other \_\_\_\_\_

payments into my account at Principal mutual funds as noted below.

Customer Name:

Name of Employer or Government Agency:

Social Security Number

Address:

City/State/Zip:

Employer's or Government Agency's Phone Number:

The amount to be deposited into my mutual fund account by "Direct Deposit" is:

Please deposit total net pay.  
 Please \_\_\_\_\_ each pay period.

NOTE: \$100 minimum per period per fund/account

You may change this amount at any time by notifying your payroll department or government agency.

Customer Signature:  
**X**

Date:

This section has information that is required by your employer/or government agency in order to establish Direct Deposit.

Please fill in your mutual fund account number in the space below to ensure correct processing.

Account Number Required for Direct Deposit Processing:												
Fund			Account Number									
7	0	9										

Transit-Routing Number:									
	0	1	1	3	0	7	1	5	8

Name of Financial Institution:  
**State Street Bank**

Account Type:  
**Checking**

**INSTRUCTIONS:**

1. If deposit is to an **existing** Principal Funds account – Complete this form and take it to your employer's payroll department or your government agency to process. Please fax a copy to Principal Funds at 1-816-218-2201 or mail a copy to the address listed above.
2. If the deposit is to a **new** Principal Funds account – Complete this form and send to Principal Funds along with the appropriate fund application. We will forward the Direct Deposit form with your account information to your payroll department or government agency.
3. Your payroll department may limit the number of direct deposit options available – For investments to more than one fund, contact them regarding their limitations. You may also contact Principal Funds regarding establishing a monthly exchange program to multiple funds.
4. All payroll direct deposits to retirement accounts will be reported as **current year** contributions.
5. Allow 4-6 weeks for processing.

**ATTENTION PAYROLL DEPARTMENT:**

1. If you receive an incomplete form, please contact Principal Funds at the telephone number listed above.
2. We **MUST** receive individual transmissions for each fund/account.
3. If you require your own form to complete, please fill in the following information on that form:
  - a Transit-Routing Number and Name of Financial Institution
  - b Account Number (you must submit all 17 digits for correct processing)
  - c Account Type – Checking