

SERVICES YOU CAN RELY ON

ADMINISTRATIVE FACT SHEET

WHEN IT COMES TO YOUR ANNUITIES

You deserve a service provider that is as flexible as it is experienced. You deserve a diverse menu of services supported by the latest technology. Look to the Principal Financial Group®. Our administrative services capabilities reflect our quality and commitment. We have the flexibility to help meet your unique needs, and the range of clients we serve demonstrates our experience.

RELY ON OUR EXPERIENCE

For more than 135 years, we've been helping clients like you achieve a more financially secure retirement. **With more than 70 years in the annuity marketplace, we deliver:**

- Administrative and investment services to more than 5,000 (12/31/2015) institutional annuity clients
- Dedicated staff to handle sales, underwriting, pricing, installation, ongoing administrative and participant services
- A proven track record, ranking as one of the top four institutional annuity issuers, cumulatively, for the past three years¹

FLEXIBLE SERVICES FOR YOUR NEEDS

No matter what your situation is, we make available services to help meet your needs.

BENEFIT PAYMENT SERVICES

- Periodic benefits paid according to your timing request
- Overnight initial retirement checks and lump sum payments
- Ability to handle multiple payment dates
- Stop payment and reissuance of checks within 48 hours
- Electronic funds transfer (EFT)
- Website access for participants to establish EFT online

¹ 2015 LIMRA

SERVICE STATISTICS (AS OF 12/31/15)

MONTHLY PERIODIC PAYMENTS:
\$161,102,952

TOTAL NUMBER OF LIVES-IN-PAY STATUS:
294,039

TOTAL PARTICIPANTS COVERED:
365,308

INTERNATIONAL SERVICE:
currently paying approximately 1,600 participants from 97 countries

AVERAGE PERCENTAGE OF PAYMENTS MADE VIA EFT:
83%

INTERNET AND PHONE SERVICES

- Access to retirement professionals over the phone
- Handle more than 96,000 calls annually (12/31/2015)
- Hearing impaired and non-English phone services available
- Calls documented tracking services
- 24/7 access to our website, including payment viewing and account service

PROPRIETARY TECHNOLOGY

- Optical disk-based storage and retrieval system for records management
- Paperless office with work automated through proprietary systems
- Payment system that helps ensure payments are sent on time

ADDITIONAL ADMINISTRATIVE CAPABILITIES AND SERVICES

- Dedicated staff for single premium services
- State, federal and foreign tax reporting and withholding, plus customized deductions
- Review the domestic relations order, and provided specific information is included, can deem qualified if there is no contract holder or per request of the employer
- Review and set-up on our records for participant directed guardianship power-of-attorney arrangements

DEPEND ON OUR TRACK RECORD

We have the capacity and experience to help meet your needs. Our 5,000 clients include:

- **AEROSPACE COMPANY:** \$500 million with 4,402 lives
- **MEDIA COMPANY:** \$495 million with 4,088 lives
- **MANUFACTURING COMPANY:** \$420 million with 1,852 lives
- **TECHNOLOGY COMPANY:** \$300 million with 7,130 lives
- **SERVICES COMPANY:** \$200 million with 9,909 lives
- **TRANSACTION TECHNOLOGY COMPANY:** \$115 million with 4,536 lives
- **GOVERNMENT ENTITY:** \$93 million with 341 lives
- **HOSPITAL:** \$70 million with 3,896 lives

OUR PEOPLE,
PROCESSES AND
PROPRIETARY
TECHNOLOGY...

have helped thousands manage their annuities flexibly and dependably. Put our experience to work for you. For more information, call **1-877-492-9830**.



WE'LL GIVE YOU AN EDGE®

Principal Life Insurance Company, Des Moines, Iowa 50392-0001, Principal.com

Insurance products and plan administrative services are provided by Principal Life Insurance Company,
a member of the Principal Financial Group®, Des Moines, IA 50392.