Principal®

Life and Individual Disability Insurance

Flexible options for application Part B

We make it easy for your clients to get the life insurance and/or individual disability insurance (IDI) they need by offering two convenient options to complete the application Part B.

Choose from two easy options:

1 | Online

This client self-service solution is available 24/7 and provides the fastest, most efficient completion process.

- When you're ready to submit a life and/or disability insurance application, initiate the process in one of two ways:
  - Complete and submit the online Part B Request Form. An email from Principal® with a secure link to the Part B will be sent immediately to the client; or
  - Call us at 888-835-3277 to request the email be sent to the client.
- Using the secure link in our email, clients will have 30 days to complete the form. They'll enter the provided verification code, complete the required information (usually takes about 30 minutes), and submit the form. If they have questions, they can call our TeleApp Engagement Center at 888-835-3277 and get assistance to either work through the rest of the online form or switch to finish it via a telephone interview. Reminder emails are sent to clients five and 10 days after receiving our initial email.
- Once your client has completed Part B, they'll receive an email link from us to eSign the document.

Fast facts about application Part B

- Approved in all states.
- Available for all life and IDI products, including combination cases[1], simply indicate both product types when requesting Part B.
- Applicants must have a valid email and read, speak, and understand English.

[1] Combination application is not available in California and New York.

2 | TeleApp phone interview

This is most appropriate for clients who may desire more assistance in answering medical questions.

- Request to have the client called by a medical application specialist in one of two ways:
  - Complete the online Part B Request Form; or
  - Call us at 888-835-3277.
- A medical application specialist will call the client at the next available time, usually within one to two days.
- If the client isn't available to take the call, we'll leave a message and send an email with the option to return our call or complete the application Part B online.
- Once your client has completed Part B, they'll receive an email link from Principal to review and eSign the document. **Note:** For applications taken in CA, FL, MT, ND, NY, SD, or WY, the client won't receive an email link to eSign, but will sign at policy delivery.

Helpful tips

- Clients should have available: medical provider names and contact information, personal medical history dates and details for the past 10 years, foreign travel in the past five years, and employment history.
- TeleApp Engagement Center hours: Monday - Friday, 7 a.m. - 6 p.m. CT.

Resources to help you get started

- **Request Part B online form.** Access the request form directly here (you can bookmark this link) or navigate to advisors.principal.com and go to New Business > Life Insurance Underwriting or Disability Insurance Underwriting > Request Part B.

Let's connect

Call our National Sales Desk at 800-654-4278.

principal.com

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