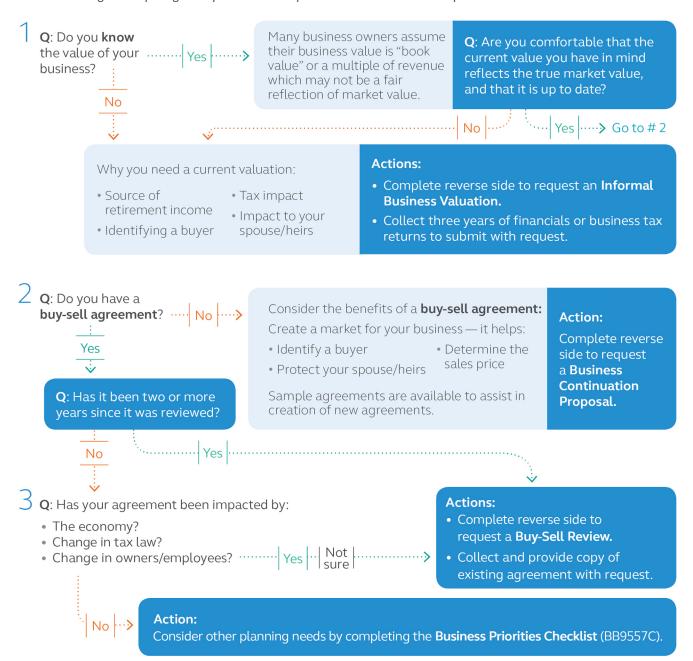


## Could you benefit from our business planning services?

Requesting complimentary services from Principal® can be that first simple step to helping you secure your financial future. Not sure if taking this step is right for you? Take a couple minutes to answer these questions.



## Ready to request services?

You need to know informal business valuations are not available for the following:

- Farms/ranches
- Real estate holding companies
- Businesses with commission as the primary revenue

- Companies with gross revenue of less than \$500,000
- Companies engaging in criminal activity
- Rental properties, such as B&Bs and hotels
- Small real estate agencies

Gather this information and submit this form, along with your most recent three full years of financials. Which proposal(s) are you requesting? ■ Buy-Sell Review ☐ Informal Business Valuation (see front for qualifications) 1. Business name: 6. Current estimated business value: ☐ 1 ☐ 2 ☐ 3 ☐ 4+ 1a. Number of business owners: 7. Expected future growth rate: DOB Ownership % 1b. Owner(s): Name 8. When do you intend to sell/transfer your business? ☐ In the next year or two; ☐ Within 2-5 years; #2 ☐ In 5 - 10 years; ☐ More than 10 years from now #3 9a. Do you have a buy-sell agreement? ☐ Yes ☐ No #4 If yes, provide a copy of the agreement. 1c. Children of owners: Number in business 9b. If you don't have a buy-sell agreement in place, to Outside of business whom do you intend to transfer the business? 1d. Nature of business/industry: Third party Co-owner 1e. Headquarters – City, State: Family ☐ Key employee 1f. Does the business own any real estate? Yes No 9c. If transferring to family, do you intend to transfer by: 0-10 2. Total number of employees: 11-50 Gift 201-1,000 1,001+ 51-100 🔲 101-200 ☐ Inheritance Unsure Years the business has been operating: Required by financial professional: 4. Type of business entity and tax status: Financial professional and proposal delivery information Corporation Proposals will NOT be provided without an indication of a valid ☐ S corporation Principal agency, or BGA office number, and/or bank/wire relationship. ☐ LLC 10. Principal agency/BGA office name and number: C corporation ☐ S corporation 11. Principal wholesaler Partnership 12. Financial professional: Sole proprietorship (if submitting Schedule Cs, please include Name and designations: an informal balance sheet of business assets and liabilities) Phone: Names of the following professional advisors: Fmail: Attorney: Accountant: 13. Bank/wire relationship: 14. Should anyone else (financial professional or BGA) receive this proposal?

## Submit your request

Financial professionals must submit form via email to newrfps@exchange.principal.com or fax to 866-946-3209.

From receipt of completed RFP and all necessary documents, please allow 5-7 business days for Proposals and up to 15-18 days for a Buy-Sell Review.

Questions can be sent to newrfps@exchange.principal.com or call 833-803-8345.

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