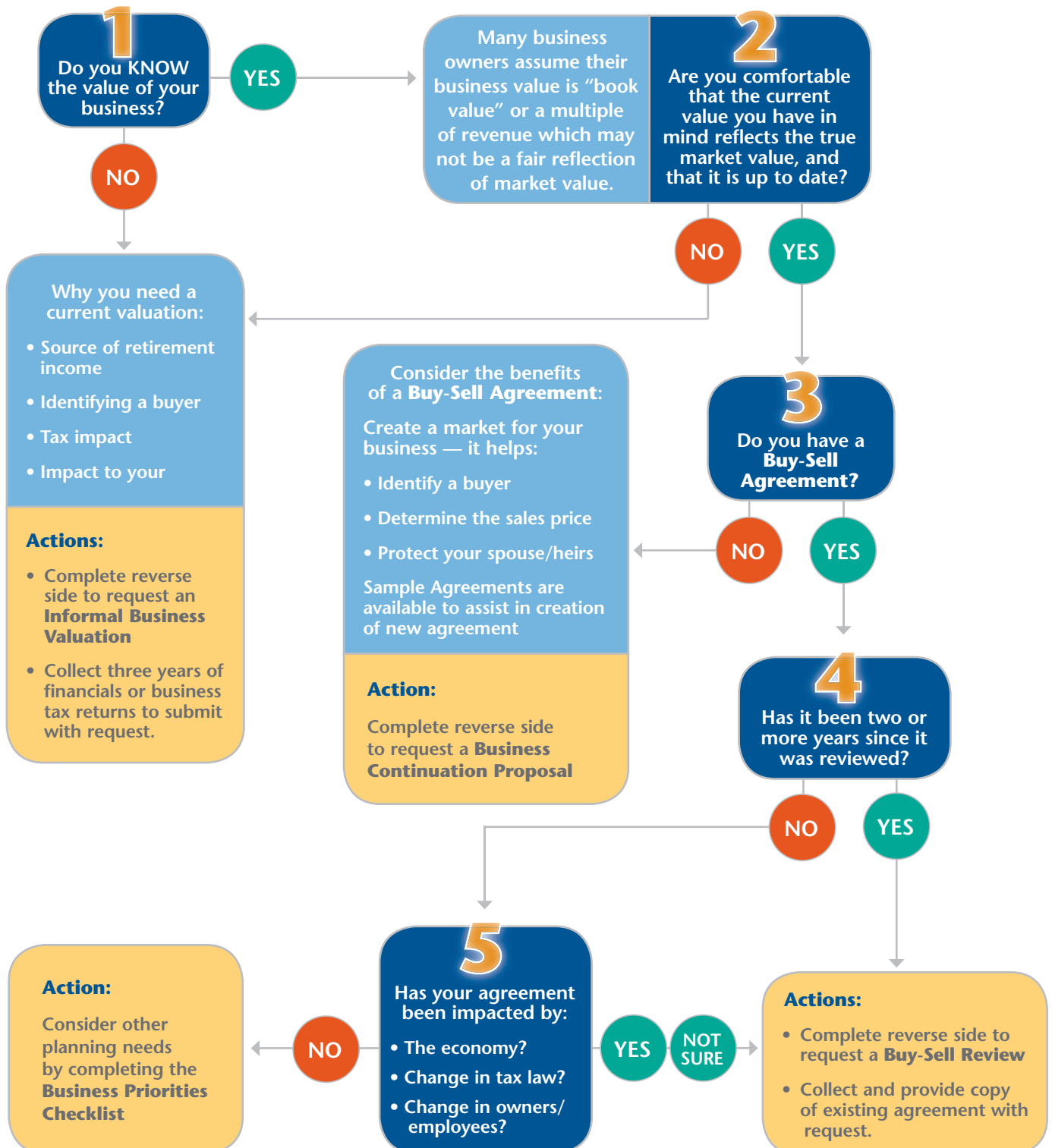


Protect Your Business. Help Secure Your Future.

Your business is your future. We offer complimentary business planning services that can help you protect your business and secure your future. By answering a few key questions, we can help you start the business planning process.



Which proposal(s) are you requesting? ☐ Informal Business Valuation ☐ Buy-Sell Review

Please complete the following information:

1. Business name: _____
- 1a. Number of business owners: ☐ 1 ☐ 2 ☐ 3 ☐ 4+
- 1b. Owner(s): Name _____ DOB _____ Ownership % _____
#1 _____
#2 _____
#3 _____
#4 _____
- 1c. Children of owners: Number in business _____
Outside of business _____
- 1d. Nature of business/industry: _____
- 1e. Headquarters – City, State: _____
- 1f. Issue state: _____
2. Total number of employees: ☐ 1-9 ☐ 10-50
☐ 51-200 ☐ 201-500 ☐ 501+
3. Years the business has been operating? _____
4. Type of business entity and tax status:
☐ Corporation
Taxed as: ☐ C corporation ☐ S corporation
☐ LLC
Taxed as: ☐ Partnership ☐ C corporation
☐ S corporation
5. Annual growth rate: _____ %
6. Do you have a buy-sell agreement? ☐ Yes ☐ No
If yes, provide a copy of the agreement.
7. If there is no written buy-sell agreement, to whom do you intend to sell to? ☐ Family ☐ Key employee
☐ Third Party ☐ Co-owner
8. ☐ Attach the most recent three years of income statements and balance sheets, or three full years of company tax returns

* In addition to providing three years of Schedule Cs, please include an informal balance sheet of business assets and liabilities

Proposals will NOT be provided without an indication of a valid Principal agency, or BGA and/or bank/wire relationship.

PRODUCER AND PROPOSAL DELIVERY INFORMATION

Advisor name: _____

☐ CFP ☐ CLU® ☐ ChFC® ☐ CEBS ☐ LUTCF ☐ Other: _____

Bank/wire relationship: _____

Principal agency/Brokerage General Agency (BGA) office:
1411 - Dunhill Insurance

Principal Wholesaler: Sherry Flint

Phone number: _____

Email address: _____

Should anyone else (Producer or BGA) receive this proposal?

Name: _____

Email address: _____

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: 800-654-4278, ext. 55436.

IMPORTANT: When sending us the completed RFP, please make sure you include 3 years of financials



EMAIL the completed RFP
and 3 years of financials to
newrfps@exchange.principal.com



PRINT the completed RFP and fax it
with 3 years of financials to the Case
Design Team: 866-946-3209



Information for The Principal presented by:

Dunhill Marketing & Insurance

WE'LL GIVE YOU AN EDGE®

Principal National Life Insurance Company and Principal Life Insurance Company, Des Moines, Iowa 50392-0001, www.principal.com

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• Not insured by any Federal government agency**