

**My Personal Information** *(please print with black ink)*

Name (Last)	(First)	(MI)	Phone Number
_____	_____	_____	(____) _____ - _____
Street Address			Email Address
_____			_____
City	State	Zip	Country
_____	_____	_____	_____
Social Security Number		Date of Birth	Gender
_____ - _____ - _____		____/____/____	<input type="checkbox"/> Male <input type="checkbox"/> Female
Expected Retirement Age		Original Date of Employment	Marital Status
_____		____/____/____	<input type="checkbox"/> Single <input type="checkbox"/> Married
If you were rehired, complete these dates:		Date of Termination	Date of Rehire
_____ / _____ / _____		____/____/____	____/____/____

NOTE: The email address you submit will be used for services provided by the Principal Financial Group®, unless otherwise elected. We will not provide your email to third parties. For more information, see your privacy policy at principal.com.

**Rollover Funds**

**YES! Tell me how The Principal can help me roll over retirement savings from a previous employer's retirement plan.** Please call me at (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

▶ Complete if you would like to consolidate retirement savings.

to discuss my options. The best time to call is \_\_\_\_\_ a.m. \_\_\_\_\_ p.m. My estimated

*To learn about rollover opportunities now, call The Principal at 1-800-547-7754, Monday – Friday, 7 a.m. - 9 p.m. CT.*

**Complete all 3 STEPS** **1** **2** **3** to enroll in the retirement savings plan, or to make changes to your contribution percentage.

**1 My Contributions**

**Enroll me! (pick one)**

- I elect to contribute 4.0% of my current and future pay per pay period. *(My employer's suggested contribution. Contribution election applies to regular pay and any bonus pay.)*
- I elect to contribute \_\_\_\_\_% (1% to 100%) or \$\_\_\_\_\_ of my current and future pay per pay period before taxes, and/or I elect to contribute \_\_\_\_\_% (1% to 100%) or \$\_\_\_\_\_ after taxes as Roth elective deferral contributions.
- I am already enrolled, but I want to change my contribution to \_\_\_\_\_% (1% to 100%) or \$\_\_\_\_\_ of my current and future pay per pay period.
- I choose **not to contribute** to the retirement plan at this time.

## My Contributions

### Principal Step Ahead Retirement Option <sup>SM</sup>

*(optional, but may help you stay on track; only applies to pre-tax, non-Roth contributions)*

In addition to electing a contribution rate, I would also like to automatically increase my contribution amount each year with **Principal Step Ahead**. I may opt out or change the percentage increase at any time.

- Step Ahead** my salary deferral contribution by \_\_\_\_\_% each year for the next \_\_\_\_\_ years OR until my contribution totals \_\_\_\_\_%. This increase – or **Step Ahead** – will be initiated each \_\_\_\_\_ (Month/Day). *If the date I choose to **Step Ahead** is within 35 days of the date this form is processed, the contribution increase will be effective the following year.*

## 2 My Investment Choices

Please elect **YOUR CHOICE** by checking the box and completing the applicable information for the choice.

*(If you are already enrolled and want to make changes to how future contributions are directed, visit [principal.com](http://principal.com) or call 1-800-547-7754.)*

### Choose your own asset allocation

- I elect the following investment options (enter percentages below.)

*(Please refer to the Investment Option Summary for more information.)*

NEW  
CONTRIBUTION  
S

#### Short-Term Fixed Income

##### Morley Financial Services, Inc

Principal Stable Value Sig Fund <sup>A</sup>

\_\_\_\_\_ %

#### Fixed Income

##### Fidelity Management & Research

Fidelity Advisor High Income Advant T Fund

\_\_\_\_\_ %

Fidelity Advisor Strategic Income T Fund

\_\_\_\_\_ %

##### Franklin Advisers, Inc

Templeton Global Bond R Fund

\_\_\_\_\_ %

##### Principal Global Investors

Bond and Mortgage Sep Acct <sup>A</sup>

\_\_\_\_\_ %

##### Spectrum

Preferred Securities Sep Acct <sup>A</sup>

\_\_\_\_\_ %

#### Balanced/Asset Allocation

##### Capital Research and Mgmt Co

American Funds American Balanced R3 Fund

\_\_\_\_\_ %

##### Ivy Investment Management Co

Ivy Asset Strategy R Fund

\_\_\_\_\_ %

##### Vanguard Group

Vanguard Target Retirement Income Inv Fund

\_\_\_\_\_ %

Vanguard Target Retirement 2010 Inv Fund

\_\_\_\_\_ %

Vanguard Target Retirement 2015 Inv Fund

\_\_\_\_\_ %

Vanguard Target Retirement 2020 Inv Fund

\_\_\_\_\_ %

My Investment Choices

	NEW CONTRIBUTIONS
Vanguard Target Retirement 2025 Inv Fund	%
Vanguard Target Retirement 2030 Inv Fund	%
Vanguard Target Retirement 2035 Inv Fund	%
Vanguard Target Retirement 2040 Inv Fund	%
Vanguard Target Retirement 2045 Inv Fund	%
Vanguard Target Retirement 2050 Inv Fund	%
<b>Vanguard Group</b>	
Vanguard Target Retirement 2055 Inv Fund	%
<b>Vanguard Group</b>	
Vanguard Target Retirement 2060 Inv Fund	%
<b>Large U.S. Equity</b>	
<b>Edge Asset Management, Inc.</b>	
Equity Income Separate Account <sup>A</sup>	%
<b>Principal Financial Advisors</b>	
Total Market Stock Index Sep Acct <sup>A</sup>	%
<b>T. Rowe Price/Brown Advisory</b>	
LargeCap Growth I Separate Account <sup>A</sup>	%
<b>Small/Mid U.S. Equity</b>	
<b>Columbus Circle Investors</b>	
MidCap Growth Separate Account <sup>A</sup>	%
<b>Delaware Management Company</b>	
Delaware Small Cap Value R Fund	%
<b>Lord Abbett &amp; Co, LLC</b>	
Lord Abbett Developing Growth R3 Fund	%
<b>Principal Global Investors</b>	
MidCap S&P 400 Index Separate Account <sup>A</sup>	%
SmallCap S&P 600 Index Separate Account <sup>A</sup>	%
<b>Principal Global/Barrow Hanley</b>	
MidCap Value III Separate Account <sup>A</sup>	%
<b>Vanguard Group</b>	
Vanguard REIT Index Inv Fund	%
<b>International Equity</b>	
<b>Capital Research and Mgmt Co</b>	
American Funds EuroPacific Growth R3 Fund	%
<b>OppenheimerFunds, Inc.</b>	
Oppenheimer Developing Markets N Fund	%
<b>Principal Global Investors</b>	
International Emerging Markets Sep Acct <sup>A</sup>	%
<b>TOTAL of all lines:</b>	<b>100 %</b>

Your investment election will be effective when it is received in the Corporate Center of The Principal by the close of market. Forms received after the close of market will be processed on the next open market date. If no investment election is received, or contributions are received prior to your investment election, contributions will be directed according to the plan's default investment option(s).

▶ *If you've completed this section, move ahead to **My Signature!*** **3**

## **3** My Signature

Please sign, then give this completed form to your benefits representative.

This agreement applies to amounts earned until changed by me in writing. I understand my plan sponsor may reduce my contributions only when required to meet certain plan limits. I will review all statements regularly and report any discrepancy to The Principal immediately.

Signature

Date

X \_\_\_\_\_ / \_\_\_\_ / \_\_\_\_

Be sure you have completed all 3 STEPS. **1** **2** **3**

## Disclosures

<sup>A</sup>For more information about this investment option, including the full name of the Separate Account, please visit [principal.com](http://principal.com) or call 1-800-547-7754 for assistance from a retirement specialist.

Your plan sponsor has chosen to make available to you all of the investment options listed on this enrollment form.

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

Information in this enrollment form/worksheet should not be construed as investment advice.

This workbook content is current as of the production date noted below. If there are any discrepancies between this information and the legal plan document, the legal plan document will govern. If the production date is older than six months, you should contact your plan sponsor or log in to [principal.com](http://principal.com) for current retirement plan and investment option information. The member companies of the Principal Financial Group® prohibit the manipulation of this workbook content. If your plan sponsor elects to provide this workbook electronically, The Principal® is not responsible for any unauthorized changes.