



Individual Life Insurance
711 High Street
Des Moines, IA 50392

Summary annual report

As of 12/31/20XX

Prepared on 01/03/20XX

JOHN DOE
ACME PRODUCTS
123 MAIN STREET
DES MOINES IA 50315

Employer number: 1234567
Program: Endorsement Split Dollar
Case number: 01
Total policy count: 02

Program summary

	Premium paid YTD	Annualized premium	Net surrender value	Net death benefit	Economic benefit
Insured name: Participant, Steve Policy number: 1111111 ¹	\$1,111.11	\$1,111.11	\$1,111.11	\$111,111.11	\$111.11
Insured name: Participant, Jill Policy number: 2222222 ¹	\$2,222.22	\$2,222.22	\$2,222.22	\$222,222.22	\$222.22
TOTAL	\$3,333.33	\$3,333.33	\$3,333.33	\$333,333.33	\$333.33

- Policy Number field above denotes issuing company:
 - ¹Principal Life Insurance Company
 - ²Principal National Life Insurance Company
- Note: This report is being provided based on our understanding that all required legal documents pertaining to this business program have been completed.
- Net Surrender Values and Net Death Benefits include any unused premiums and reflect any reductions due to policy loans, if applicable.
- Note: It is important to periodically review the Key Executive insurance program to ensure that the business is still adequately protected against the loss of a key employee's services. Contact your representative for assistance.

Contact us

For additional information regarding this report, please contact:

Your Financial Representative

Joe Producer, CLU, ChFC
999.999.9999

Executive Benefits Administrator

Brad D Baack
Executive Benefits Administrator
800.247.9988 EXT 56434
baack.brad@principal.com

Program values report
(valuation period 12/31/20XX - 12/31/20XX)

	Beginning value	YTD value change	Total value	Loan principal	Loan interest	Total indebtedness	Surrender charge	Net surrender value
Insured name: Participant, Steve Policy number: 1111111	\$0.00	\$1,111.11	\$1,111.11	\$0.00	\$0.00	\$0.00	\$0.00	\$1,111.11
Insured name: Participant, Jill Policy number: 4075610	\$0.00	\$2,222.22	\$2,222.22	\$0.00	\$0.00	\$0.00	\$0.00	\$2,222.22
TOTAL	\$0.00	\$3,333.33	\$3,333.33	\$0.00	\$0.00	\$0.00	\$0.00	\$3,333.33

- Term Life Insurance Policies would not be reflected on this report since they do not accumulate value.

Insurance products are issued by Principal National Life Insurance Company (except in New York) and Principal Life Insurance Company. Securities offered through Principal Securities, Inc., member SIPC. Referenced companies are members of the Principal Financial Group®, Des Moines, IA 50392