

# Primary Security Administrator Contact Information

Principal Life Insurance Company  
Des Moines, IA 50392-0001  
1-877-475-3436  
www.principal.com  
A member of Principal Financial Group®



Subtype 110105

For plan services provided by Principal Life Insurance Company (Principal Life)  
Please complete this form and send via email to your Principal Life representative.

## Section 1: Company Information (please type or print in BLACK ink)

Plan name \_\_\_\_\_ Plan ID / Contract number \_\_\_\_\_

If your plan is using our location recordkeeping service, please specify which location the Primary Security Administrator changes are for:

## Section 2: Security Administrator Options—Add

Add a new Primary Security Administrator

NOTE: The previous Primary Security Administrator will no longer have website access if this option is chosen. If the previous Primary Security Administrator needs website access, please see Section 3 below.

Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Home street address, City, State and ZIP \_\_\_\_\_

Home phone \_\_\_\_\_ Business phone \_\_\_\_\_ Business email address \_\_\_\_\_

Business name \_\_\_\_\_ Business street address, City, State and Zip \_\_\_\_\_

## Section 3: Security Administrator Options—Change

Change a Primary Security Administrator

Change an existing Primary Security Administrator's website access (see Section 4)

Change an existing Primary Security Administrator's contact information (see Section 2)

Change an existing Primary Security Administrator to a Secondary Security Administrator

Primary Administrator's Name: \_\_\_\_\_

Retain all current access as a Secondary Security Administrator

New Primary Security Administrator will grant appropriate access to Secondary Security Administrator.

Remove Primary Security Administrator

Primary Administrator's Name: \_\_\_\_\_

Note: When removing a Primary Security Administrator, a new Primary Security Administrator must be assigned.

Specific access to information on the website for the Secondary Security Administrator will need to be granted by the Primary Security Administrator by using Manage Security. This can be done once the Primary Security Administrator has logged in via Employer login. The Secondary Security Administrator will have limited access to view the services that Principal Life provides to the retirement plan.

Change an existing Secondary Security Administrator to a Primary Security Administrator

Secondary Security Administrator's Name: \_\_\_\_\_

## Section 4: Website Application Access for Specific Roles

(Security Access will be given based on the authority to sign retirement plan documents – please mark all boxes below  
Is the Primary Security Administrator:

- Authorized to sign as the Plan Sponsor?  Yes  No
- A Trustee for the retirement plan?  Yes  No  
Note: Trustees are named in the Plan and/or Trust Agreement. If this is a Trustee change, please contact your Principal Life representative.
- The Named Plan Fiduciary (if other than the Plan Sponsor)  Yes  No  
Note: Must be named in the Plan document.
- Authorized to sign as an Adopting Employer, if applicable.  Yes  No

Note: If any of the above items are marked Yes, access to the Plan View Unsigned Docs application (No. 1045) will automatically be activated.

## Section 5: My Signature

My signature authorizes Principal Life Insurance Company to make or update our organization's Primary Security Administrator contact information as noted above. NOTE: If the person signing this form is also being named the Primary Security Administrator, then this form should be signed by a different authorized individual for the plan, if one exists.

**X**

\_\_\_\_\_  
Authorized Individual for the Plan – Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Authorized Individual for the Plan – Print

**Primary Security Administrator:** This individual has the authority to grant full or limited security access to other individuals and manage the security for those individuals as they deem appropriate. This individual has full access to the employer website on principal.com.

**Secondary Security Administrators:** An individual that is designated by the Primary Security Administrator to view or transact on the employer website. The Primary Security Administrator will grant access to all Secondary Security Administrators in a full or limited capacity, at their discretion. All Secondary Administrators must obtain his/her own username and password and they cannot give access to other individuals.

**Setting up access:** Access will be granted/changed per the form generally within one business day; this timing may vary. Once access has been granted, please return to the employer web site to log in or create your login credentials. The Primary Administrator and Secondary Administrator can call Corporate Customer Service (formerly known as Electronic Data Services) at 1-877-475-3436 or their service representative to receive assistance in setting up a username, password and employer access code. If there are special circumstances that require we rush this request, please call the service representative for assistance.