**Making it easy to do business every day**

**Access to insights and resources you can use**

Congratulations on a successful 2019! At Principal®, we value our relationship with you and look forward to a great 2020.

**New Privileged Partner brokers1**

These brokers have qualified for the 2020 Group Benefits Privileged Partner Program for Principal®. Through the program, Principal recognizes top-producing brokers for new and retained Principal group benefits business, with two prestigious membership levels: Elite and Platinum. Rewards and status grow as business with Principal grows.

[Learn more about the rewards of this program](https://secure02.principal.com/publicvsupply/GetFile?fm=GP61917&ty=VOP&EXT=.VOP).

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| --- | --- | --- |
| **UBA Office**  | **Principal Office**  | **2020 Status** |
| Horan Associates, Inc. | Cincinnati | Elite |
| Armfield Harrison & Thomas Inc.  | Seattle | Platinum |
| Blueprint Benefit Advisors, LLC | New England | Platinum |
| Brooks Jucha & Associates Insurance Services, Inc. | San Diego | Platinum |
| Creative Planning Benefits, LLC | Kansas City | Platinum |
| Dwight W Andrus Ins Agency, Inc. | Dallas | Platinum |
| Fringe Benefit Analysts Insurance Company | Phoenix | Platinum  |
| MJI Inc. DBA Hagan Hamilton Insurance | Portland | Platinum |
| NXTGEN, LLC | Cincinnati | Platinum  |
| Shepard & Walton Life Insurance Agency | Houston | Platinum |
| Upshaw Insurance Agency, Inc. | Dallas | Platinum |

**Technology buzz**

1. **Ease collaboration**

Get your Principal book of business integrated more quickly. Take full advantage of this real-time application program interface (API) integration. This program will save you time initially and throughout the year, eliminating manual upload of your Principal cases to Ease. Plus, there’s no additional per employee per month cost. This API connection is included in your Ease subscription fee. [Get the details](https://secure02.principal.com/publicvsupply/GetFile?fm=GP62328&ty=VOP&EXT=.VOP).

1. **Employee Navigator collaboration**

Make the benefit process smooth and hassle-free for your clients with this enrollment and administration solution. And it’s fast. The Principal connection is finalized in minutes—with no need for technical expertise. Data is exchanged weekly, ensuring information is accurate and up to date. And, it’s easy to set up a carrier connection. Simply connect each client to Principal Data Exchange in Employee Navigator. There’s no additional per employee per month fee. [Find out more](https://secure02.principal.com/publicvsupply/GetFile?fm=GP62396&ty=VOP&EXT=.VOP).

**How does your client’s benefit design stack up?**

Use our benchmarking tool to find out! The Principal Benefit Design ToolSM provides a personalized report of how your client’s benefit design for dental, disability, and life insurance stacks up to similar companies. All you need to do is:

* Gather the client’s benefit design information.
* Go to benefitdesigntoolpp.principal.com.
* Enter the information in the tool.
* Get a personalized report to share with your client.

**Continuing Education (C.E.)**

Did you know we offer a variety of [C.E. courses](https://secure02.principal.com/publicvsupply/Results?s=q&rdResPerPage=20&showKit=false&fm=GP62185&fst=ALL) to help you complete your C.E. requirements? Contact your sales representative to learn more or to schedule a C.E. Here are just a few of the courses available:

* Employee Leave Considerations – Talks about eligibility, types of leave, and how leaves work together.
* Using supplemental benefits
* Takeover Cases
* Group Insurance – Understanding Tax Implications
* Group DI – Provisional Basics
* Education & Enrollment of Voluntary Benefits
* Ethics & Compliance
* Benefit Administration Systems

**The right benefits can make all the difference**

Your clients want quality benefits that fit their budget and work for their employees. And you can depend on employee benefit solutions from Principal. Our flexible products can be customized to meet the needs of your clients and their employees. We offer dental, disability, life, vision, and supplemental solutions, including critical illness2 and accident.

Finally, as Principal monitors the COVID-19 impact, adjustments are being made that allow continued service to customers while protecting the health and safety of employees and their families. Use [this resource](https://www.principal.com/landing-page/managing-uncertainty) with plan sponsors, employees, policy holders—and any consumer who places their trust in Principal insurance solutions. This page will be updated as needed to address common questions and offer support.

Contact your sales representative for more information on Principal products or services or give Karla Herley a call.

Karla Herley

Senior Relationship Manager

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1Principal Privileged Partners are highly valued non-medical producers and have not entered into a legal partnership with any company of the Principal Financial Group®. This program may be changed or discontinued at any time.

2Specified disease in New York.

Please remember to abide by the company’s policy on disclosure of compensation. You can obtain more information as well as a sample disclosure form at [www.principal.com](http://www.principal.com).

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