



Quick tips to help you finish the year strong

Can you believe 4th quarter has already started? Use this time to set yourself—and your clients—up for a strong finish to the year. Here are some tips that can help.

- **Send us your quotes.** We're here to help you create a tailored benefits package for your clients or enhance what they already have. Principal® has a **broad range of product options** to choose from, including life,

disability, dental, vision, critical illness¹, and accident coverages. Send us your quotes so we can help you get started today.

- **Don't forget about the benefits of eService.** Using eService during this busy time of year helps you and your clients get quick access to important information and speedier transaction processing. This [video](#) shows how easy it is to do things using eService, including member transactions, access billing and ID cards, and review documents like census information, booklets, and policies.
- **Include information about previous carriers.** When you're moving existing coverage to Principal, smooth out the transition by providing information about the prior carrier when you submit the case.

Recent news

- **Critical illness (CI) infectious disease benefit and enhanced CI & Accident health screening benefit² available in CA, DC, and FL on Nov. 1, 2021.** [See current state approvals.](#)
- **Online evidence of insurability (EOI).** Don't forget we have a simple, online process for EOI that leads to faster decisions. And the email with instructions to complete the online EOI will now be sent directly to the employee if Principal has the email address—saving your client's time. Use these new resources with [employers](#) and their [employees](#) to help answer questions about the process.

Let's connect

Contact me for more tips to help you set yourself up for a strong finish to 2021.

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¹ Specified disease in NY.

² Health screening benefit for critical illness and the wellness benefit for accident have the same approval dates when offered for both products in that state.

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