

Life insurance

# Preparing to complete your personal information questionnaire

## TeleApp underwriting instructions

Start the underwriting process for life insurance from the convenience of your home using TeleApp. Using this personal information questionnaire is a quick and easy way for us to get information we need from you to start the application process.

It's your choice — complete the questionnaire online<sup>1</sup>, call us at your convenience, or if that doesn't fit with your schedule, we'll call you.

### Your call is scheduled:

Between hours of \_\_\_\_\_ and \_\_\_\_\_ a.m./p.m.

On this date: \_\_\_\_\_

[Let's get started.](#)

### What to expect during the interview

1

Your financial representative will schedule an interview to complete your personal information questionnaire for you on your behalf. This questionnaire can be completed online, or you can call in directly to the Principal TeleApp Contact Center. If you prefer, we can call you based on a scheduled date and time.

2

If you scheduled the questionnaire interview for a later time, an interviewer from Principal<sup>®</sup> will call you during your scheduled timeframe to complete it. The call should take approximately 20-25 minutes (extensive health histories may take longer).

3

An underwriter will review the information provided on your questionnaire and determine if additional medical exams are needed. See next page for additional details.

### Information needed for personal information questionnaire

To help complete your questionnaire as quickly as possible, please have the following information available:

- Product type: \_\_\_\_\_ and amount of life insurance coverage you're applying for: \_\_\_\_\_
- Advisor name: \_\_\_\_\_ advisor phone number: \_\_\_\_\_
- State in which application was signed: \_\_\_\_\_
- Names and addresses of physicians and hospitals providing medical care in the last 10 years: \_\_\_\_\_  
\_\_\_\_\_
- Names of medications you take or have taken in the last 10 years: \_\_\_\_\_
- Current earned income, unearned income and net worth: \_\_\_\_\_
- Foreign travel: \_\_\_\_\_

### Complete your questionnaire today!

You can complete the questionnaire online<sup>1</sup>, or call 1-888-TeleApp (1-888-835-3277), option 0.

**TeleApp Contact Center hours:**  
**Monday-Thursday, 7 a.m.-10 p.m. CT /**  
**Friday, 7 a.m. – 7 p.m. CT**

## Additional medical exams after completing your personal information questionnaire

Your medical history is documented as part of the questionnaire, but we still may require a medical exam based on your age, medical history and protection amount requested. The exams may include:

- Measurements of blood pressure, pulse, height and weight
- Blood sample to test cholesterol levels, blood sugar and other blood chemistry values
- Urine sample to check for the presence of blood, protein, sugar, nicotine and other lab values
- Electrocardiogram to measure the heart's electrical impulses

### Tips to prepare for the medical exam

Follow these recommendations to help you achieve the best results.

#### Do not:

- Eat or drink within 12 to 14 hours before your exam or blood draw
- Smoke or chew tobacco at least one hour prior to the exam
- Use alcohol or nonprescription drugs within 24 hours before the exam
- Ingest caffeine within eight hours before the exam
- Exercise strenuously within 24 hours before the exam

## When it's all said and done

After the underwriting process is complete, you'll receive information on how to access your test results (if applicable) and details on policy issuance, including how much your payment will be.



### Let's connect.

Contact your financial representative if you have any questions about the underwriting process.



[principal.com](https://www.principal.com)

<sup>1</sup> Some restrictions apply when using the online option, such as you must have a valid email address. The online option is available in all states except New York. It is not available to use for individual disability insurance cases, including combination life/disability applications. And, you must speak and understand English. If you don't meet any of these requirements, you'll need to contact Principal to complete your questionnaire via phone call or traditional paper application.

Principal National Life Insurance Company and Principal Life Insurance Company, Des Moines, Iowa 50392-0001, [www.principal.com](https://www.principal.com)

Insurance issued by Principal National Life Insurance Co. (except in NY), Principal Life Insurance Co. and the companies available through the Preferred Product Network Inc. Plan administrative services provided by Principal Life. Principal National, Principal Life and the Preferred Product Network are members of the Principal Financial Group, Des Moines, IA 50392.

**Not FDIC or NCUA insured**

**May lose value • Not a deposit • No bank or credit union guarantee  
Not insured by any Federal government agency**

Principal, Principal and symbol design and Principal Financial Group are trademarks and service marks of Principal Financial Services, Inc., a member of the Principal Financial Group.

BB10268-06 | 12/2018 | 674706-112018 | ©2018 Principal Financial Services, Inc.