

Could you benefit from our business planning services?

Requesting complimentary services from Principal[®] can be that first simple step to helping you secure your financial future. Not sure if taking this step is right for you? Take a couple minutes to answer these questions.



Ready to request services?

You need to know informal business valuations are not available for the following:

- Farms/ranches
- Real estate holding companies
- Businesses with commission as the primary revenue

- Companies with gross revenue of less than \$500,000
- Companies engaging in criminal activity
- Rental properties, such as B&Bs and hotels
- Small real estate agencies

Gather this information and submit this form, along with your most recent three full years of financials.

Which proposal(s) are you requesting?	Informal Business Valuation (see front for qualifications)	
1. Business name:	6. Current estimated business value:	
1a. Number of business owners: 1 1 2 1	7. Expected future growth rate: %	
1b. Owner(s): Name DOB Ownership % #1	 8. When do you intend to sell/transfer your business? In the next year or two; Within 2-5 years; 	
#2	□ In 5 - 10 years; □ More than 10 years from now	
#3 #4	9a. Do you have a buy-sell agreement?	
1c. Children of owners: Number in business Outside of business	9b. If you don't have a buy-sell agreement in place, to	
1d. Nature of business/industry:	whom do you intend to transfer the business? Third party Co-owner	
1e. Headquarters – City, State:	 Third party Co-owner Key employee Family 	
1f. Does the business own any real estate?	9c. If transferring to family, do you intend to transfer by:	
2. Total number of employees: 0-10 11-50 51-100 101-200 201-1,000 1,001+	Sale Gift Inheritance Unsure	
3. Years the business has been operating:	Required by financial professional:	
 4. Type of business entity and tax status: Corporation Taxed as: C corporation S corporation LLC Taxed as: Partnership C corporation S corporation 	 Financial professional and proposal delivery information Proposals will NOT be provided without an indication of a valid Principal agency, or BGA office number, and/or bank/wire relationship. 10. Principal agency/BGA office name and number: 	
Partnership	11. Principal wholesaler	
 Factorship Sole proprietorship (if submitting Schedule Cs, please include an informal balance sheet of business assets and liabilities) 	12. Financial professional: Name and designations:	
5. Names of the following professional advisors:	Phone:	
Attorney:	Email:	
Accountant:	13. Bank/wire relationship:	
	14. Should anyone else (financial professional or BGA) receive this proposal?	
	Name:	
	Email address:	

Submit your request

Financial professionals must submit form via email to newrfps@exchange.principal.com or fax to 866-946-3209. From receipt of completed RFP and all necessary documents, please allow 5-7 business days for Proposals and up to 15-18 days for a Buy-Sell Review. Questions can be sent to newrfps@exchange.principal.com or call 833-803-8345.

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