

# Take steps toward your financial goals

WITH ONE-ON-ONE ADVICE AND EDUCATION MEETINGS.



Attend a personalized, advice meeting with a licensed professional to review your retirement goals, your current retirement picture, and to get advice and help on some of the financial topics most important to you.

Receive point-in-time advice to your top questions, like<sup>1,2</sup>:

- ✓ How much should you defer in your retirement account?
- ✓ How should you invest in your retirement plan?
- ✓ How could a digital professionally managed account work for you?

You can also get education on topics such as:

- ✓ Financial wellness resources
- ✓ Reviewing beneficiaries
- ✓ Roth vs. pre-tax savings<sup>3</sup>

Discuss your top financial topics, like:



Your personal goals and needs



Knowing how much to save



Choosing Investments

**Sign up for an advice and education one-on-one meeting.**

**Visit [principal.com/Advice1on1](https://principal.com/Advice1on1) to get started.**

## **Prepare for your virtual meeting**

- Establish your username and password at [principal.com](https://principal.com)
- Use your cell phone for two-factor authentication
- Choose which topics you want to cover in the meeting



<sup>1</sup> DC asset allocation and investment selection - not including, assets subject to Plan Sponsor restriction, employer securities or funds available through the Plan's brokerage window, guaranteed interest accounts, mutual fund windows or assets held outside of the Plan Account, if applicable.

<sup>2</sup> Salaried Principal Advised Services licensed adviser.

<sup>3</sup> When available on the plan or through individual retirement accounts.

### **Investing involves risk, including possible loss of principal.**

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