

Customer Profiles*

Who are your best BOES sales prospects?

	General profile of our more than 10,500 BOES clients	Exit planning cases (3,604 out of 10,500 BOES plans)	Entity and Cross Purchases (EP/CP) (95% of exit planning cases)
Top five industries 	<ol style="list-style-type: none"> Professional, scientific and technical services: 16.6% Manufacturing: 12.5% Construction: 12% Wholesale trade: 9.9% Retail trade: 7.8% 	<ol style="list-style-type: none"> Professional, scientific and technical services: almost 20.4% Manufacturing: 12.8% Construction: 10.8% Wholesale trade: 9.2% Retail trade: 8.1% 	<ol style="list-style-type: none"> Professional, scientific and technical services: 20% (CP)/22% (EP) Manufacturing: 11% (CP)/11% (EP) Construction: 13% (CP)/12% (EP) Wholesale trade: 9% (CP)/9% (EP) Retail trade: 10% (CP) Health care & social assistance: 7% (EP)
Employee size 	<ul style="list-style-type: none"> 1-99 employees: over 80% <ul style="list-style-type: none"> 11-30 employees: 25% 1-4, 5-10 and 31-99 employees: almost 20% for each section 100-1,000 employees: under 20% 	<ul style="list-style-type: none"> 1-99 employees: almost 90% <ul style="list-style-type: none"> 11-30 employees: almost 30% 1-10 employees: 41% 31-99 employees: 17% 100-1000 employees: less than 10% 	<ul style="list-style-type: none"> 1-99 employees: 83% (EP)/89% (CP) <ul style="list-style-type: none"> 11-30 employees: 25% (EP)/28% (cross purchase) 1-10 employees: 47% (CP)/37% (EP) 31-99 employees: 20% (EP)/14% (CP) 100 – 1,000 employees: less than 10% for each
Years in business 	<ul style="list-style-type: none"> 25+ years: almost 41% 11-24 years: 29% 1-10 years: 25% 5% unknown 	<ul style="list-style-type: none"> 25+ years: almost 37% 11-24 years: 32% 1-10 years: 26% 5% unknown 	<ul style="list-style-type: none"> 25+ years: 39% (EP)/32% (CP) 11-24 years: 36% (CP)/31% (EP) 1-10: almost 27% for each 5% unknown
Annual sales volume 	<ul style="list-style-type: none"> \$1 to \$3 million: almost 57% \$3.1 - \$10 million: 18% \$10.1 to \$50 million: 12% \$50.1 to \$501+ million: less than 3% 10% unknown 	<ul style="list-style-type: none"> \$1 to \$3 million: 63% \$3.1 - \$10 million: 17% \$10.1 to \$50 million: almost 10% \$50.1 - \$501+ million: 1.5% 9% unknown 	<ul style="list-style-type: none"> \$1 to \$3 million: 69% (CP)/59% (EP) \$3.1 to \$10 million: 20% (EP)/14% (CP) \$10.1 to \$50 million: 10% (EP)/8% (CP) \$50.1 - \$501+ million: less than 2% 10% unknown
Entity type 	<ul style="list-style-type: none"> 65% are corporations (S or C) Almost 13% are partnerships 5.3% are sole proprietors 16.4% other 	<ul style="list-style-type: none"> 63% are corporations (S or C) 15% are partnerships 6.2% are sole proprietorships 17% other 	<ul style="list-style-type: none"> Corporations (C or S): 63% (EP)/60% (CP) Partnerships: 16% for both EP & CP Sole proprietors: 7% (CP)/5% (EP) Other: 17% for both EP & CP

*In Q3 2013, the Principal Financial Group[®] asked its Corporate Market Center to provide statistics on our BOES block of business based on customer data. Dunn & Bradstreet demographic data is appended almost 90 percent of the time. The information presented here is a summary of that data.

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	Clients who have purchased key person insurance (3,797 out of 10,500 BOES plans)	Executive Benefit cases with NQ supplemental retirement focus	Executive Benefit cases with death benefit focus
Top five industries 	<ol style="list-style-type: none"> Professional, scientific and technical services: 17% Manufacturing: over 13% Construction: 11% Wholesale trade: 10.6% Finance and insurance: 7.3% 	<ol style="list-style-type: none"> Construction: almost 14.3% Manufacturing: over 13.2% Wholesale trade: 9.6% Professional, scientific and technical services: 9.4% Healthcare and social assistance: 9.1% 	<ol style="list-style-type: none"> Construction: 14.7% Manufacturing: 13.5% Professional, scientific and technical services: 10.3% Retail trade: 9% Wholesale trade: 8.7%
Employee size 	<ul style="list-style-type: none"> 1-99 employees: over 80% <ul style="list-style-type: none"> 1-10 employees: almost 35% 11-30 employees: 25% 31-99 employees: 21% 100-1,000 employees: 14% 	<ul style="list-style-type: none"> 1-99 employees: almost 80% <ul style="list-style-type: none"> 1-10 employees: over 36% 11-30 employees: 23% 31-99 employees: 18% 100-1,000 employees: 23% 	<ul style="list-style-type: none"> 1-99 employees: almost 80% <ul style="list-style-type: none"> 1-10 employees: almost 40% 11-30 employees: 23% 31-99 employees: 16% 100-1,000 employees: 20%
Years in business 	<ul style="list-style-type: none"> 25+ years: 40% 11-24 years: 28% 1-10 years: 27% 5% unknown 	<ul style="list-style-type: none"> 25+ years: 40% 11-24 years: 28% 1-10 years: 26% 6% unknown 	<ul style="list-style-type: none"> 25+ years: 46% 11-24 years: 31% 1-10 years: 17% 8% unknown
Annual sales volume 	<ul style="list-style-type: none"> \$1 to \$3 million: almost 53% \$3.1 - \$10 million: 19% \$10.1 to \$50 million: 14% \$50.1 to \$501+ million: less than 4% 10% unknown 	<ul style="list-style-type: none"> \$1 to \$3 million: almost 53% \$3.1 - \$10 million: 17% \$10.1 to \$50 million: 12% \$50.1 to \$501+ million: less than 6% 12% unknown 	<ul style="list-style-type: none"> \$1 to \$3 million: almost 53% \$3.1 - \$10 million: 18% \$10.1 to \$50 million: 13% \$50.1 to \$501+ million: 4% 12% unknown
Entity type 	<ul style="list-style-type: none"> 66% are corporations (S or C) 16% other 14% are partnerships 4% are sole proprietors 	<ul style="list-style-type: none"> 71% are corporations (S or C) 17% other 6% are partnerships 6% are sole proprietors 	<ul style="list-style-type: none"> 73% are corporations (S or C) 14% other 7% are partnerships 6% are sole proprietors



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Principal National Life Insurance Company and Principal Life Insurance Company, Des Moines, Iowa 50392-0001, www.principal.com

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