



Mailing Address:
P.O. Box 9351
Des Moines, IA 50306-9351

Principal Bank | **Safe Harbor IRA
Signature Card**

As the Account Owner, you are responsible for certifying that the information on this form is correct and for signing and returning this Safe Harbor IRA Signature Card to Principal Bank. If you fail to complete, sign and return this signature card and provide the Custodian, Principal Bank, with accurate information, the payment of the IRA proceeds to you may be delayed or, if the Custodian is unable to locate you, may be forfeited under state property laws.

Section 1 – Account Owner Information

Name of Account Owner (first, middle, last)		Account Number
Street Address (required)	Email Address (used by Principal only)	
City	State	ZIP Code
Mailing Address (optional)		
City	State	ZIP Code
Mother's Maiden Name	Birthdate (MM/DD/YYYY)	Home Phone

Section 2 – Certification and Signature (Required by IRS regulations)

Taxpayer ID Number: My Federal Tax ID number or Social Security Number is
This is my correct taxpayer identification number.

Please check the box below if it applies to you.

Nonresident Alien: I am neither a citizen nor a resident of the United States.

Certification: Under penalties of perjury, I certify that the statements above are correct and I have checked the correct box(es).

Compensation Disclosure: I understand that Principal Bank or other companies with which it is affiliated may pay compensation, directly or indirectly, to various intermediaries or selling professionals for the sale or referral of Principal Bank products.

Documents: I certify that I have read the following documents and that I have retained a copy of each as a legally binding record of my rights and obligations under my Principal Bank Safe Harbor IRA. I agree to the terms and conditions stated on these documents and acknowledge receipt of a completed copy of each on today's date.

- Traditional IRA Custodial Booklet
- Principal Bank Terms & Conditions and Required Disclosures
- Principal Bank Schedule of Fees
- Privacy Notice

Please sign and return this document to:

Principal Bank
PO Box 9351
Des Moines, IA 50306-9351

Signature of Account Owner	Date (MM/DD/YYYY)
X	
Signature of Custodian (Principal Bank Representative)	Date (MM/DD/YYYY)
X	

Note: Beneficiary information does not carry over from a 401(k) plan. If you would like to add a beneficiary, please complete an IRA Designation of Beneficiary form.