



Important information
for retirement plan participants

How do I update beneficiaries?

1. [Start by logging in](#). Look for the account you want to review.
2. On the top menu, click “Overview” and select “Beneficiaries.”

Principal® Home My Accounts ▾ Planning and guidance ▾ JC John Customer ▾

DC Plan

John Customer - Sample Group Defined Contribution Plan

Overview ▾ Contributions ▾ Investments ▾ My options Rollovers Planning Resources ▾

401(k) Account Dashboard

Beneficiaries

Statements

Plan Fees

Account History

Plan Information & Forms

August 4, 2025

\$23,529.41 >

\$6,285.00 >

Need investment help?

We know not everyone is an investment pro, and that's why your plan has wide range of options. See what kind of help you can get when it comes to your investment options.

[Check out your options now >](#)

My progress Performance Compare me

3. Follow the prompts to add or edit beneficiaries.
4. **Make sure you have at least ONE primary beneficiary listed.

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DC Plan

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Beneficiaries

Tell us who should receive your retirement account benefits should you pass away. Review your designations from time to time, or when life changes happen, to make sure they still match your wishes.

Are you legally married? * ⓘ

Yes No

Primary ⓘ + Add

None added yet

Contingent (Secondary) ⓘ + Add

Must add a primary first

Prefer to mail a form?

Download paper form: [English](#) | [Spanish](#)

When completed, return to:

Mail
Principal Financial Group
P.O. Box 9394t
Des Moines, IA 50306-9394

Fax
1-866-704-3481

If you need help, contact Principal at **1-800-986-3343**

