

Simple, scalable retirement plan solutions with a single service provider.



Bringing innovative tools, resources and best-in-class service and support to help you manage a strong retirement program.

Principal® Total Retirement Solutions helps you streamline your retirement plan.

As a single service provider, we offer comprehensive solutions for:

Defined contribution

Pension solutions

Nonqualified deferred compensation

Stock plans

Trust and custody

Discover the power of ONE

Participant experience

One call for plan service needs

One mobile app to view plan info

One consolidated account view

One education approach

One financial wellness resource

Plan sponsor experience

One experienced relationship manager

One digital platform

One holistic view of their retirement plans

One provider to submit plan data

One provider to monitor as a fiduciary

One provider is in reference to the plan recordkeeper or if applicable, Pooled Plan Provider. If you delegate to other providers such as a 3(38), you'll need to monitor as well.

Intended for financial professional and plan sponsor use.

Why Principal®?

It comes down to scale.

Scale drives fixed costs down and allows you to spread those costs across multiple plans. Best of all, scale applies across our retirement plan solutions.



Strength in numbers

Top 3 defined contribution recordkeeper¹

#1 employee stock ownership plan²

#1 defined benefit recordkeeper³

#1 nonqualified deferred compensation⁴

Top 3 pension risk transfer provider⁵

\$1T in safeguarded trust and custody assets⁶



¹ Top 3 defined contribution provider by number of participants, according to the annual PLANSPONSOR Recordkeeping Survey, July 2020. This internal statistical data is as of Dec. 31, 2019, and representative of plan services on the Principal® and Wells Fargo Institutional Retirement & Trust systems. Please note: Adding numerical data together may not show a true representation of the data.

² No. 1 ESOP provider by number of plans, according to the annual PLANSPONSOR Recordkeeping survey, July 2020.

³ No. 1 defined benefit recordkeeper by number of plans. Source: PLANSPONSOR Defined Benefit Administration Survey May 2020.

⁴ No. 1 non-qualified provider based on total number of Section 409A plans. PLANSPONSOR Recordkeeping survey, July 2020.

⁵ No. 3 Pension risk transfer provider. Based on total PRT assets, LIMRA Secure Retirement Institute, as of 12/31/2019.

⁶ \$1 trillion in safeguarded trust and custody assets according to the annual PLANSPONSOR Recordkeeping Survey. Principal and Wells Fargo IRT combined plansponsor.com data as of July 2019.

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