

## Proposed Principal Group Portfolio for Cheryl

Cheryl's Proposed Portfolio at Principal Group			
FUND	VALUE	PERCENT	E/R
Core Plus Bond	\$81,255.80	25%	0.71%
LargeCap S&P 500 Index	\$113,758.12	35%	0.31%
MidCap S&P 400 Index	\$48,753.48	15%	0.31%
SmallCap S&P 600 Index	\$16,251.16	5%	0.31%
Diversified International	\$65,004.64	20%	1.06%
<b>Total</b>	<b>\$325,023.20</b>	<b>100%</b>	

### Instructions for Cheryl:

1. Sell/Exchange the following:
  - Principal Stable Value Fund
  - Principal Lifetime 2030
  - Large Cap Growth I
  - MidCap Value I
  - Principal Global Investors MicCap
  - Principal Financial Group, Inc. Stock
2. Tell PFG to put all your new contributions into Core Plus Bond.
3. Can you do a deductible traditional IRA in addition to your 401(k)?
4. Can you do an "inservice transfer" into your Vanguard IRA?
5. Request paperwork showing other fees you are paying.
6. Request the contract for your plan.
7. What is the limit on transfers in your account?
8. Can you transact buys and sells online? Where is this located on your online account?