

## Unsure of what to do next?

No list can cover all the thoughts going through your head, but this checklist will give you a place to start:

- ✓ Order copies of the death certificate.
- ✓ Gather financial information
  - Bank accounts
  - Credit cards
  - Retirement plans
- ✓ Locate any safety deposit boxes.
- ✓ Locate official documents, like wills, income tax returns or trusts.
- ✓ Contact an attorney.
- ✓ Contact the Social Security Administration.
- ✓ Review your financial situation.
- ✓ Review your designated beneficiary.
- ✓ Update or create your will.

### Magellan Healthcare

Magellan is committed to helping people resolve work and personal issues. For 50 years, Magellan has provided comprehensive, evidence-based behavioral health care management and employee assistance programs to improve health care outcomes.



[principal.com](https://www.principal.com)

Group life insurance from Principal® is issued by Principal Life Insurance Company, 711 High Street, Des Moines, IA 50392.

This service is not a part of any insurance contract and may be changed or discontinued at any time. Not available to group policies issued in New York.

Principal® has arranged with Magellan Healthcare to make Grief Support Services available to life insurance beneficiaries. Although Principal® has arranged to make this program available to you, the third-party provider is solely responsible for its products and services. Magellan is not a member of the Principal Financial Group®.

Principal, Principal and symbol design and Principal Financial Group are trademarks and service marks of Principal Financial Services, Inc., a member of the Principal Financial Group.

GP57381-04 | 06/2019  
© 2019 Principal Financial Services, Inc.



Group life insurance

# Navigating the loss of a loved one

**Beneficiary Support Services provide help during difficult times**



The loss of a loved one might be one of the hardest things you ever go through. And while the details and decisions you face may seem overwhelming, you don't have to go it alone.

## A guide through grief

We know that during difficult times it's easy to put yourself last. That's why Principal® provides beneficiaries of our life insurance policies with Grief Support Services from Magellan Healthcare that can help you focus on your well-being.



Grief Support Services are available at no cost to you.

### We encourage you to take advantage of free Grief Support Services, including:

- 24/7 access to confidential guidance and coping strategies
- Personal coaching over the phone or video teleconference
- Local legal service referrals<sup>1</sup>
- Community resource referrals
- Private self-screening for depression

### You also have access to online resources, such as:

- Health and wellness resources
- Legal tools and forms<sup>2</sup>
- Self-assessments for grief, depression and stress
- Resources for talking to children about death
- Parenting and eldercare support

### Need additional assistance?

A counselor can help you find an affordable solution. Any fees resulting from referrals outside of Grief Support Services are your responsibility.

<sup>1</sup>Participants are referred to a local lawyer. A consultation is available by phone or in person, and there is no charge for up to one one-hour consultation per topic per year. Additional legal services are available at discounted rates.

<sup>2</sup>Online only.

When you need support, get in touch

**Consultation:** 800 274 4529

**TTY for hearing impaired:** 800 456 4006

### Online resources:

MagellanAscend.com

Enter **Principal Grief Support** for the company name

## Investing in yourself

Your loved one made an investment in your future. We can help you protect and manage it. Whether it's questions about investments, income or insurance options, we'll be there to guide you.

### Ready to talk to a financial expert?

Call 877-692-3831 between 7 a.m. and 7 p.m. central time.

