



What good benefits look like.

- FOR CUSTOMERS**
- Prepare for your taxes
 - Find claims and forms
 - Find a dentist
 - Get account help
 - Contact us

- 

Insure →
- 

Invest →
- 

Retire →



Log in to your account.

Username

Password

Log in

[Forgot username](#) | [Forgot password](#)

New user? [Create an account](#)

Trouble logging in? [Get help.](#)

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Create an account

Choose one of the following that best describes your role so you can create an account.

Individuals —

I have retirement or insurance products (on my own or through my workplace).

Create an individual account

Businesses & auditors +

Financial professionals +

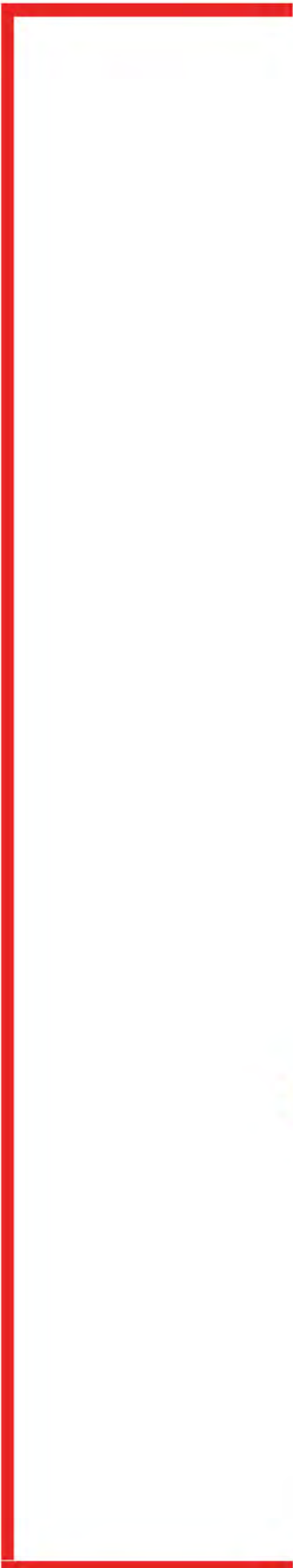
Third party administrators +

3(16) & plan administrators +

Dental providers +

**Fill out
Relevant
Info**

**ID # is
your SSN
with no
dashes**



First name *

Please use your legal name.

Last name *

Date of birth *

Valid format is MM/DD/YYYY

Phone number *

Valid format is (XXX) XXX-XXXX. This is the quickest way for us to verify your identity. We will not use this number for marketing purposes.

ID Number *optional*

*

If your employer provided you with a Privacy or Alternate ID, use it here. Otherwise, you can try your Social Security Number, or leave this field blank.

Primary zip code *optional*

I consent to doing business electronically. [i](#)

Help us verify your identity.

To verify your identity we will send a secure code to your phone. How would you like to receive your code?

Text a code to +XXXXXXXX9561.

Call +XXXXXXXX9561 with a code.

[Send secure code](#)

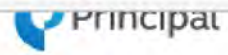
[Verify my identity another way](#)

[800-986-3343](tel:800-986-3343) | [Contact us](#)

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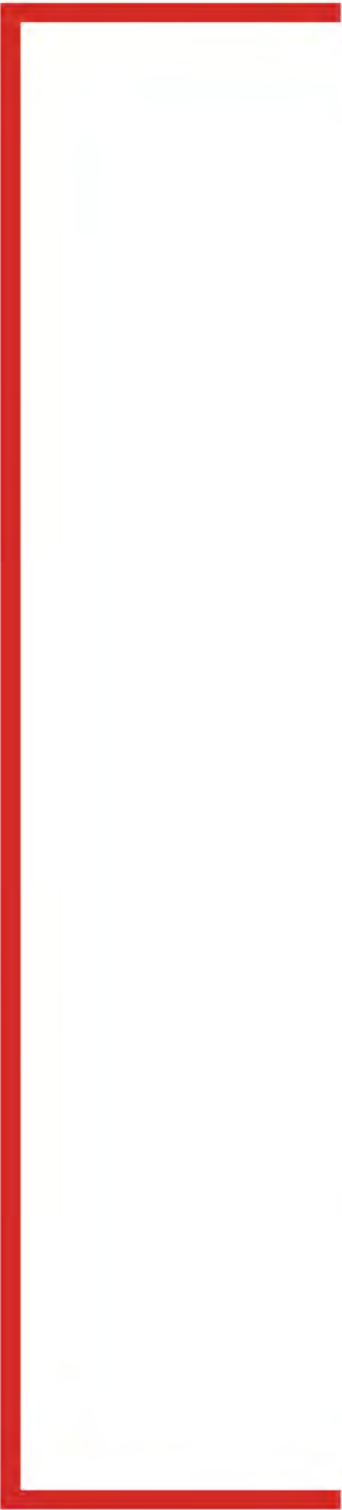
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Choose a username and password.

**Create a username
and password**
Confirm your email



Create a unique username *

Username must be 8-32 characters and include at least 2 numbers. No special characters or spaces, please.

Enter a unique password *

Password must be 8-64 characters and have at least 1 number and 1 letter. It cannot include your username. Most special characters are accepted.

Confirm your password *

Email address *

We'll also need an email address for security and communication purposes.

Confirm your email address *

Continue

Ensure that you use a personal email address

Do not use your "@tatesrents.com" email address



Log out

ESOP Account



John Doe - Tates Rents, Inc. Employee Stock Ownership Plan and Trust

Overview ▾ Contributions Education hub ▾

Account Balance (More Info)

through Dec 31, 2021

\$-,---.---

Investment Option	Current Balance	Share Price	Shares
Tates Rents, Inc. ESOP Stock (as of 12/31/2021)	\$-,---.---	-,---.---	-,---.---
Total	\$-,---.---		

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Feedback

ESOP Account



John Doe - Tates Rents, Inc. Employee Stock Ownership Plan and Trust

- Overview ^
- Contributions
- Education hub v

Account summary (More Info)

through Dec 31, 2021

Beneficiaries

Statements

Account history

Plan information

Total

Current Balance

Share Price

Shares

ESOP Stock (as of 12/31/2021)

\$-,---

\$-,---

-,---

\$-,---

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Where to find the Beneficiaries tab

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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.

[Add or Edit Beneficiaries](#)

Current beneficiary designation

Primary ⓘ
John Doe [View details](#) 100%

Contingent (Secondary) ⓘ
None added yet

Prefer to mail a form?

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

When completed, return to:

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

Fax
866-704-3481

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- [Change Password](#)
- [Change Customer Service Question and Answer](#)

Contact Information

- [Update Email Address](#)
- [Update Mobile Number](#)
- [Update Address](#)

Preferences

- [Manage 2-Factor Authentication Preferences](#)
- [Manage Delivery Preferences](#)

My Documents

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personal information
(email, address,
etc.).**

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