

Steve Thompson, MSFS, ChSNC, BCAA, CAS, CFS – Special Care Planner – Cleveland, OH



After seeing information about MassMutual's SpecialCareSM Program, Steve Thompson became a Special Care Planner in 2007. At the time, he was providing financial planning for clients, and he noticed that more and more of his clients had children with special needs.

"I wondered if I was truly helping these special needs families – did I have the right information to help address their situations? Their children's needs were most important, even above their own retirement goals. So, along with another member of our agency, I attended the MassMutual program to learn more about how we could better help these families."

After attending the SpecialCareSM Program seminar, Steve knew that this is what he wanted to focus on.

"The day I got back from class, I had a client come in and say that her son had been diagnosed with a disability. We put together a plan to protect the son's government benefits and the client's assets.

"I think what makes life care planning¹ important to me is the people we work with, and the people around them. They do so much for their children. They want to make sure everything is taken care of because, ever since their child's birth or diagnosis, planning for his or her future has been the priority."

In addition to becoming a Special Care Planner, Steve's work with various non-profit organizations in his community and serving on the board of directors for the Easter Seals Northern Ohio chapter prompted him and his colleagues to create the Michael Carter Foundation. This foundation raises money for local organizations that service the special needs community.

Steve is a graduate of Miami University and holds a Bachelor of Science degree in Finance. He also earned his Master of Science degree in Financial Services (MSFS) from the Institute of Business and Finance. Steve received his Special Care Planner certificate² from The American College, exclusive to MassMutual's SpecialCareSM Program. He is also a member of the first class of agents to receive the newly developed Chartered Special Needs Consultant (ChSNCTM) designation from The American College.

Steve Thompson is a registered representative of and offers securities, investment advisory and financial planning services through MML Investors Services, LLC, member [SIPC](#).
Supervisory Office: 1660 West 2nd Street, Suite 850, Cleveland, Ohio 44113, (216) 621-5680.

¹A life care plan is a coordinated program of future care planning, financial, and legal strategies for people with disabilities and their families. A life care plan continually changes throughout an individual's lifetime and is provided by a team that may include your legal and tax advisors as well as insurance and investment professionals.

²The Special Care Planner receives advanced training and information in estate and tax planning concepts, special needs trusts, government programs, and the emotional dynamics of working with people with disabilities and other special needs and their families. The certificate program is offered by The American College in Bryn Mawr, PA, exclusively for MassMutual Financial Professionals.