

PlanChampionSM

Be a Champion for Your Clients

Bring enhanced fiduciary care to every plan sponsor client

PlanChampion includes Fi360 to help financial professionals meet their fiduciary responsibilities with comprehensive fund analysis and scoring



Fi360 is offered through MassMutual Investments' PlanChampion program, a comprehensive practice management solution designed to help financial professionals grow and enhance their business.

PlanChampion is dedicated to empowering financial professionals, providing the tools and resources they need to enhance and grow their business at every turn. Through the Fi360 Fiduciary Score[®], PlanChampion is helping financial professionals meet their fiduciary responsibilities to plan sponsors by helping them demonstrate a prudent investment selection and monitoring process.

Expand Your Business with the Fi360 Fiduciary Score[®]

For over 15 years, the Fi360 Fiduciary Score[®] has been used as a transparent and objective investment rating system to evaluate open-ended mutual funds, and other types of investments. It helps financial professionals demonstrate a prudent investment selection and monitoring process with easy to understand and highly visual displays — helping you drive new business and expand existing relationships.

- **Generate compelling investment proposals** — Provide prospects with a concise comparison of their investments allowing you to effectively discuss your proposed changes.
- **Conduct more impactful and engaging client meetings** — Document your due diligence process with engaging visuals that will resonate with clients.
- **Generate hypothetical benchmark reports** — Use a model's current allocation or upload allocation history for a more complete picture.
- **Develop custom fact sheets and peer comparison reports** — Demonstrate fiduciary excellence with compelling reports for use in marketing materials and presentations.

Help win new business using the Fi360 Fiduciary Score®

Current Holdings
for Main Street Manufacturing

Proposed Holdings
for Main Street Manufacturing

OVERVIEW

15

TOTAL INVESTMENTS
IN THIS REPORT

76 / 100

ASSET WEIGHTED Fi360
FIDUCIARY SCORE®

16

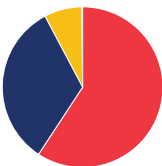
TOTAL INVESTMENTS
IN THIS REPORT

17 / 100

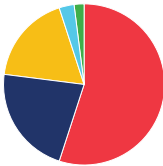
ASSET WEIGHTED Fi360
FIDUCIARY SCORE®

ASSET ALLOCATION

BROAD ASSET CLASS	#	%	ASSETS
U.S. Equity	6	59.24	4,166,318
International Equity	5	7.63	536,499
Sector Equity	0	0.00	0
Commodities	0	0.00	0
Taxable Bond	3	33.00	2,320,853
Money Market	1	0.13	9,300
TOTAL*	15	100	7,032,970



BROAD ASSET CLASS	#	%	ASSETS
U.S. Equity	8	55.00	3,868,135
International Equity	3	18.00	1,265,934
Sector Equity	1	2.00	140,659
Commodities	1	3.00	210,989
Taxable Bond	3	22.00	1,547,254
Money Market	0	0.00	0
TOTAL*	16	100	7,032,971



*Total assets may differ slightly due to rounding

Fi360 helps to ensure financial professionals like you are equipped with the knowledge and tools you need to implement a prudent, scalable investment process so you can continue to enhance your services to plan sponsors and help grow your business.

About MassMutual

For more than 170 years, MassMutual has operated under a single guiding principle: to help people secure their financial futures. Through its PlanChampion program, MassMutual Investments extends this legacy by supporting its financial professional community with unparalleled retirement resources and actionable guidance to help them grow their business.

For more information, contact MassMutual at 1-866-329-6277, option 2.

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MassMutual defines plan advisers as the financial professionals that provide service to defined contribution plans as fiduciaries under ERISA 3(21) or 3(38) only, even though the financial professional may offer other services outside of their investment advisory role.

MassMutual Investments is the marketing name for certain products and/or services of MassMutual and its subsidiaries, including MML Investment Advisers, LLC (MML Advisers). Investment advisory services of MassMutual Investments are provided exclusively by MML Advisers. MML Advisers is a subsidiary of MassMutual.

