MassMutual Investments

PlanChampion℠

Be a Champion for Your Clients

The MassMutual Investments PlanChampion program is a comprehensive practice management solution designed exclusively to help successful financial professionals like you enhance and grow your practice.

Outcome-Oriented Approach

With the increased complexity of working with retirement plans comes an increase in the demands placed on you. The role you play as an adviser to a plan is continually changing — due to DOL, IRS, or SEC rule changes, or because plan sponsors are starting to expect more than mere oversight of their investment lineups. Clearly, as the role of a fiduciary evolves you need to continually “upgrade” your services to plan sponsors or risk putting the growth of your practice in jeopardy.

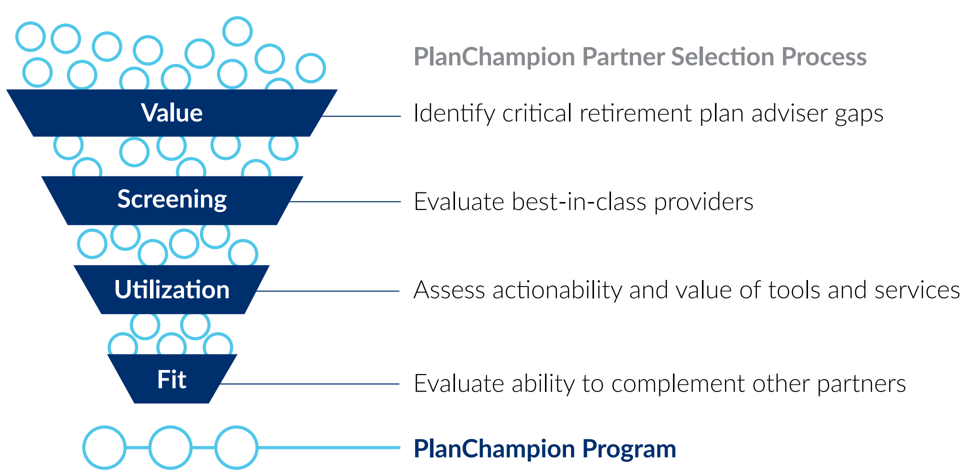
PlanChampion is designed specifically to help you meet the challenges of your expanded and evolving role as a fiduciary. The approach starts with the end in mind, ensuring that you receive support where it matters most — **in winning new business and expanding your existing plan sponsor relationships.**

By partnering with some of the leading resources in the retirement plans market, solutions are matched to different stages within your sales cycle.

Partnership Model

The goal is to find what is considered the best-in-class in providing support. This is why an “open architecture” partnership model was developed, giving you access to unbiased expertise from multiple industry experts. As part of PlanChampion, elements are selected of their respective programs and expertly blend to drive actionable value to your practice. New partners, tools, and resources are continually reviewed and assessed to further enhance the strength of PlanChampion and address the evolving needs of financial professionals like you.

The result is a comprehensive, structured practice management program that is greater than the sum of its parts — incorporating a robust suite of resources, actionable guidance and ongoing support to give you and your practice a demonstrable edge.



PlanChampion Partners

The hand selected premier partners, expertly blending and curating their services to align with each step of your business development and client lifecycle.

Retirement Learning Center

The Retirement Learning Center (RLC) is the foremost independent thought leader in the retirement and rollover space, offering a suite of solutions to help plan advisers establish and grow their retirement business.

Fi360
A Broadridge Company

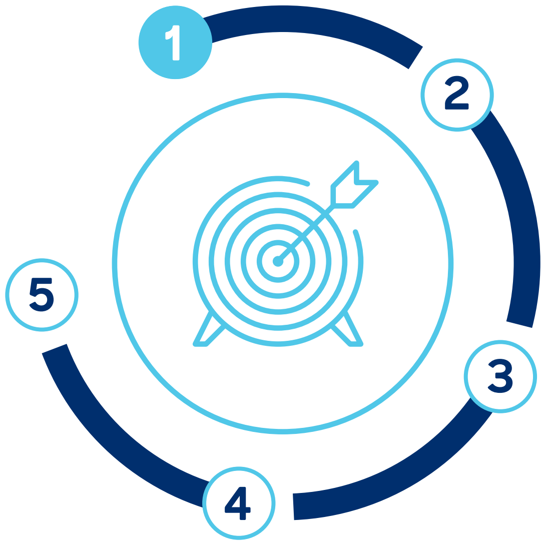
Fi360 empowers financial intermediaries to profitably gather, grow and protect investors' assets with a fiduciary standard of care.

BrightScope®

Through a combination of proprietary, integrated datasets, insight and industry-leading platforms, BrightScope helps plan advisers drive growth through more informed, data-driven decision making.

The Plan Adviser-Client Lifecycle

There are many ways to structure a practice management program, but it is critical that a program is centered on helping plan advisers advance their business and better support their clients. This is the core philosophy behind PlanChampion — how can PlanChampion help you.



Awareness

For many plan advisers, prospecting can be a daunting task without the benefit of knowing the right plans to target.

With PlanChampion, you have access to customized, targeted lists that will help make your prospecting efforts more efficient and effective in driving awareness of your firm. Plan sponsor and record keeping lists are developed with you in mind and are regularly updated to ensure you're targeting those who can truly benefit from your services. Ongoing guidance and support is provided to fully optimize your targeting efforts.

You get:

- Plan Beacon Reports consisting of data from 5500 and other plan details.
- Prospecting lists to target specific plans for plan advisers by geography, asset class or other criteria.

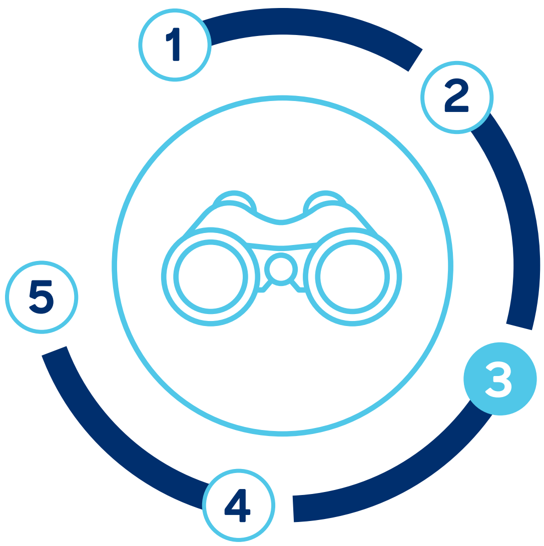
Interest

PlanChampion continues to support you once you've established awareness of your practice with key targets.

Help is provided to garner enhanced interest in your services and in preparing for prospect meetings — including refining and articulating your value proposition, conducting needs assessments and delivering detailed prospect insights through tailored plan sponsor reports and questionnaires.

You get:

- Fi360 and RPAG Fund Reports that offer fund lineup comparisons.
- Valuable industry and technical insights by ERISA plan specialists.



Consideration

Getting a prospect to actively consider your services requires a proven plan and a firm grasp of the challenges that plan sponsors face.

PlanChampion provides the plan and know-how so you'll always come from a place of strength and are prepared and polished in your follow-up meetings and finals presentations with plan sponsors. You'll have access to retirement experts through a dedicated 800 number, with additional tools for accessing your prospect's plan governance readiness, an investment lineup comparison tool and more.

You get:

- Recommended action steps used to improve three focus areas Investment, Administration, and Outcome.

Commitment

You handle the relationship, PlanChampion partners help with the preparation and understanding required to "close the deal" with a prospect and successfully demonstrate the value that you bring.

PlanChampion works with you to clearly differentiate your services from your competitors by showing a deep understanding of your prospect's retirement plan. Through dedicated coaching and ongoing phone consultations, you'll be well-positioned to secure a commitment from even your most challenging prospects.

You get:

- Highly experienced RLC resource desk to help you win business.
- 5500 plan "Deep Dive" through consultations with ERISA consultants.

Loyalty & Advocacy

Once you've signed on a new client, the real work begins.

To retain your most coveted clients and establish their enduring loyalty, you must ensure your service levels are first-rate and that you continuously show your value. PlanChampion's suite of tools, resources and consultations help you deliver outstanding service to your clients throughout the relationship. Through ongoing guidance and advanced client assessment tools, you'll gain an acute understanding of each client's level of advocacy and referral "readiness"—as well as the know-how required to get them to advocate your services to additional prospects.

Many plan advisers don't get credit for all the value they add beyond assisting with a plan's investment lineup. It is important to be able to provide plan benchmarking to show the ongoing value you're adding to the plan and participant wellness.

You get:

- Highly experienced customer retention specialists to help you build a loyal customer base.

About MassMutual Investments

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

Access to certain aspects of the PlanChampion program may be limited.
Talk to your MassMutual representative for more information.

The Retirement Learning Center, Fi360, and BrightScope are not affiliated with MassMutual or any of its subsidiaries.

MassMutual defines plan advisers as the service financial professionals provide 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.

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