MassMutual Investments

# PlanChampion℠

## Be a Champion for Your Clients

**PlanChampion℠ is a practice management program that turns retirement advisers into Champions.** PlanChampion works by aligning specific external partner capabilities to advisers and sponsor needs — the result is a roster of industry leading development, analytical, and governance tools that drive better plan outcomes for sponsors, their participants, and advisers' practices by placing YOU, the adviser, as the PlanChampion for your clients.

## WHAT YOU MAY RECEIVE

**Our team at MassMutual® works with you to develop specific actionable, business-building ideas that leverage our expansive network of specialists within the PlanChampion program.**

### Targeting Clients

- **Plan Beacon Reports:** consisting of data from 5500 and other plan details that are available for adviser use
- **Prospecting Lists:** target specific plans for advisers by geography, asset class, or other criteria

### Needs Assessment

- **Fi360 Fund Reports:** provide fund lineup comparison reports

### Finals Presentation

- **Recommended Action Steps:** used to improve the 3 focus areas (Investment, Administration, and Outcome) packaged up in professional, easy to use presentations
- **Detailed Plan Deep Dives:** get detailed analysis of plan's 5500 from Retirement Learning Center (RLC) ERISA consultants (8-10 hrs. of prep time per report) for plans over $50M

### Close

- **Expertise at the Ready:** access to highly experienced RLC resources desk to help win business

### Retention

- **Benchmark Your Plans:** track them regularly before competitors do
- **Resources at the Ready:** access to highly experienced RLC resources desk to help retain business

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

# PlanChampion puts Today's Retirement Advisers at the Center

MassMutual's PlanChampion program is powered by some of the industry's leading experts and is your key to accessing the resources you need to support your business and your clients' needs:

**Your Clients**

**Retirement Advisers**

**PlanChampion:**
**1-866-329-6277**

The Retirement Learning Center (RLC) is the foremost, independent thought leader in the retirement and rollover space. RLC offers multi dimensional educational and business building solutions, content development resources and consulting expertise to help financial service professionals and firms establish and grow their retirement businesses.

Fi360 empowers financial intermediaries to use the Prudent Practices® to profitably gather, grow and protect investors' assets with a fiduciary standard of care. Our training, technology and analytics make implementing a prudent process for all clients easier at every step.

BrightScope, an ISS Market Intelligence company, provides financial information and technology solutions to the global asset management industry. Through its combination of proprietary, integrated datasets, insight and industry-leading platform, BrightScope delivers solutions that drive strategy and data-driven decision making for individual investors, corporate plan sponsors, asset managers, broker/dealers, and financial advisers.

**FOR FINANCIAL PROFESSIONALS. NOT FOR USE WITH THE PUBLIC.**

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

MassMutual defines advisers/retirement 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.



IS1070 1124 MM202612-307706