MassMutual
Investments

PlanChampion℠
Be a Champion for Your Clients

Giving you an edge to strengthen and grow your practice

PlanChampion offers Retirement Learning Center, a leading retirement educational resource for financial professionals

RETIREMENT LEARNING CENTER

Retirement Learning Center's resources and services are part of MassMutual's PlanChampion program, a comprehensive practice management solution designed to help advisors grow and enhance their business.

MassMutual's PlanChampion program is dedicated to providing financial professionals with a comprehensive suite of tools to enhance and grow their practices. Through Retirement Learning Center (RLC), you have access to one of the leading retirement educational resources in the industry — including extensive thought leadership and in-depth, one-on-one consultations to help you better serve your clients and grow your business.

With RLC and PlanChampion, you'll have expertise and support at your fingertips — giving you the retirement plan know-how to address the increasing demands of plan sponsors.

Resource desk

Access to highly experienced consultants

- Access to sales support, technical ERISA help and retirement plan guidance
- Staffed by retirement plan experts each with over 17 years of experience
- Broad topical expertise including 401(K), 403(b), 457, nonqualified plans, governmental plans, stock compensation programs, Social Security, IRAs and more

One-on-one consultations

Increase business efficiency and drive revenue

- Access to a cadre of expert speakers for client and prospect meetings
- Guidance on plan design strategies
- Intelligence gathering to assist in winning new plans

Form 5500 deep dive*

In-depth analysis of Form 5500

- Provide insight on the plan, help you analyze the filing and uncover areas for potential improvement
- Receive a detailed written report providing key areas of the plan and discussion points for plan sponsor meetings
- Conduct a conference call with RLC consultant to walk you through the review findings

**Services subject to availability and plan minimum requirements*

With more than two decades of experience serving advisors like you, RLC has become a trusted resource to more than 43,000 professionals in the retirement industry, helping them navigate the ever-changing retirement landscape.

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 extends this legacy by supporting its advisor community with unparalleled retirement resources and actionable guidance to help them grow their business.

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