

Reliability on record

At our firm, a financial professional career centers around helping clients secure their futures and protect the ones they love. Our biggest strength is our people and their dedication to improving the community they live and work in.

The following information shows our extensive ties with the community based on our client relationships as of: **December 31, 2023:**



83,381

Number of clients¹

\$10,360,119,295

Life insurance coverage in force²

\$61,331,888

Life insurance benefits (claims) paid³

\$6,047,788

Disability income insurance benefits (claims) paid⁴

\$6,167,240,916

Client policy, contract, and account values⁵

\$30,188,161

Dividends to eligible, participating whole life policyowners⁶

\$4,626,408,443

MMLIS assets under management⁷

\$11,150,000

LifeBridge (cumulative) coverage in force⁸

\$70,000

MassMutual Foundation Community Service Awards⁹

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“Throughout MassMutual’s history, we’ve known that the world is better when we all look out for each other. We call that mindset **Live Mutual.**”

Roger Crandall
Chairman, President, and
Chief Executive Officer

One firm – all the boxes checked

We’re proud to affiliate with MassMutual®, a company delivering a commitment and establishing the trust that wins over clients. Through prosperous and turbulent times, mutual ownership has helped us deliver long-term value to policyowners in our community.

- ✓ **A leader in financial strength and stability**
- ✓ **A top independent broker-dealer**
- ✓ **Ultra-competitive product solutions**
- ✓ **Top-tier sales expertise**
- ✓ **Cutting-edge technology**



For more information, contact:

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Take the next steps

Whether you're new to the career or established, it's time to take your practice to the next level. Take your career further, faster.

Join our firm today.

¹ An owner of a MassMutual policy or contract.

² Amount of individual life insurance in force as of 12/31/23 related to products issued by Massachusetts Mutual Life Insurance Company and its subsidiaries, C.M. Life Insurance Company and MML Bay State Life Insurance Company.

³ Amount of individual life insurance claims paid from 1/1/23 to 12/31/23 related to products issued by Massachusetts Mutual Life Insurance Company and its subsidiaries, C.M. Life Insurance Company and MML Bay State Life Insurance Company.

⁴ Amount of disability income insurance claims paid from 1/1/23 to 12/31/23 related to products issued by Massachusetts Mutual Life Insurance Company.

⁵ Includes values of MassMutual's and subsidiary insurance companies' insurance products, retirement products, and investment products offered through MML Investors Services, LLC, a MassMutual subsidiary, in 2023.

⁶ The amount of dividends to eligible participating whole life policyowners in 2023.

⁷ As of 12/31/23. Does not include MassMutual proprietary products or third-party investment advisor programs.

⁸ Amount of cumulative LifeBridge coverage in force through 12/31/23. MassMutual's LifeBridgeSM program provides free \$50,000 ten-year term life insurance policies to eligible parents and legal guardians. MassMutual pays the premiums.

⁹ MassMutual and The MassMutual Foundation have provided charitable donations that recognize the volunteer commitment and community impact of financial professionals since 1997.

