



# MMSD Life & DI

## 2022 year-end guideline dates

**Our priority is to help you reach your year-end goals.** The dates provided below are a guide to ensure the best home office service, timely payment of commissions and proper business credit.

Our final commission close is Dec. 20 to pay in 2022. We will continue to work diligently through year end on Dec. 30, 2022 to handle requirements as they are received.

**Note:** The last DTCC COM cycle of the year is Dec. 30, 2022.

### Key dates

<p><b>Nov. 21</b></p>	<p><b>New formal and informal applications:</b> Submit in good order* applications to the MassMutual Corporate Office (paper application or via iGO e-app entry) if needed for Final Commission Close, 2022 commissions or business credit.</p> <p><b>Life:</b></p> <ul style="list-style-type: none"> <li>o <b>Life App Express (LAX)</b> for required new business life forms.</li> <li>o <b>Life Forms by State</b> for required and optional new business forms.</li> </ul> <p><b>DI:</b> Use MassMutual's <b>Disability Income New Business Application Package Wizard</b> when sending out a new application package.</p> <p><b>Worksite Voluntary Benefits:</b> Product applications and enrollment files must be received in good order.</p> <p>*Inclusive of completed contracting and onboarding. Please contact Advisor Services at the email below with assistance:</p> <ul style="list-style-type: none"> <li>o <b>MMSDBrokerServicesHub@MassMutual.com</b> email box for submission of MMSD producer contracting and other producer related requests i.e., name changes, agent changes, address changes, etc.</li> <li>o <b>MMSDBrokerServicesInquiry@MassMutual.com</b> email box to submit inquiries on the status of producer contracting and other general inquiries.</li> </ul>
<p><b>Nov. 24</b></p>	<p><b>Thanksgiving Day.</b> MassMutual offices closed.</p>
<p><b>Nov. 25</b></p>	<p><b>MassMutual offices will close at 1:00pm ET.</b></p>
<p><b>Nov. 29</b></p>	<p><b>Life and DI medical examinations and lab testing:</b> Recommended last day for proposed insureds to be examined or have blood/urine/oral fluids samples collected to ensure all results are submitted in time to review for year-end processing.</p> <p>If exams or lab test findings prompt the need for an APS then additional processing time will be required.</p>

<b>Dec. 2</b>	<b>Underwriting and Issue Requirements (including DI contract changes and life term conversions):</b> This is the last day to submit in good order underwriting and issue requirements to the MassMutual Corporate Office to ensure policy pages are available for timely delivery and payment before the final commission close on Dec. 20.
<b>Dec. 5</b>	<b>Paid and Unpaid 90-Day re-issues that do not require underwriting:</b> Change requests on issued and unpaid life and DI policies should be requested no later than today to ensure new policy pages are available for timely delivery and payment before the final commission close on Dec. 20.
<b>Dec. 16</b>	<b>Delivery requirements and initial premium payments:</b> Submit in good order delivery requirements and payment to place case by the final commission close.
<b>Dec. 20</b>	<b>Final Commission Close for 2022 commission payment.</b>  <b>For firms on DTCC,</b> the last DTCC COM cycle of the year is Dec. 30, 2022.
<b>Dec. 26</b>	<b>Christmas Day observed.</b> MassMutual offices closed.
<b>Dec. 27</b>	<b>Delivery requirements and initial premium payments:</b> Submit in good order delivery requirements and payment to place case by Dec. 30 to be included on final DTCC COM cycle for 2022.
<b>Dec. 30</b>	<b>The last DTCC COM cycle of the year.</b>

## FURTHER INFO

- For special handling or rush requests, please contact:
  - **Vicki Hopson**, Life Customer Relationship Specialist, tel. 860-835-8276.
  - **Lisa Lefebvre**, Life Customer Relationship Specialist, tel. 413-744-2591.
  - **Catherine Rodgers**, DI New Business/Underwriting Director, tel. 413-744-3561.
- For sales support, please call the MMSD Sales Desk at 800-601-9983 and press 1.
- MMSD Life Insurance Managing Directors [territory map and contact list](#).
- MMSD Disability Income Managing Directors [territory map and contact list](#).



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