

Online Strategy Reallocation User Guide

With online renewal strategy selections, you can easily modify strategy allocations for clients who have authorized you to reallocate on their behalf.

Accessing Renewal Strategy Selections

You must have an active website login to access this feature. If you need to create an account, please visit mybusiness.massmutualascend.com/login and select **Create a User ID** and register.

Once logged in, you can access the strategy selections page by hovering your mouse over **Business Management** on the menu. Next, choose **Renewal Strategy Selection**.

Hover your mouse over **Business Management** on the main menu, then select **Renewal Strategy Selection**.

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My Clients

Pending New Business

Not In Good Order

Pending Transfers

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Renewal Strategy Selection

Required Minimum Distribution (RMD) Policies

Correspondence

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Filtering Your Search

To find a client, filter your search by entering their name, the agent’s name, date of issue, the term end date or the policy number.



My Clients

Pending New Business

Not In Good Order

Pending Transfers

Active Policies

Renewal Strategy Selection

Overlaid Minimum Distribution

Surrender Notices

Advisory Fees

Producer Management

Renewal Strategy Selection

Search for fixed-indexed annuity renewals. Please note that the more data you enter, the more refined your search will be. Renewal documents are available for download 25 days prior to the renewal date. Please note that renewal documents dated prior to 10/6/16 are not available online.

Enter the client’s information then select **Search**. A table will populate below the form with results.

Filter Your Search

Tip: When searching by last name, please input at least two letters of the last name.

Start Date

2/21/2023

End Date

3/23/2023

Client Last Name

Client First Name

Agent Last Name

Agent First Name

Agent Number

Policy Number

Confirming Authorization To Reallocate On A Client’s Behalf

Once the search filter is complete, a table with client information will populate below the form based on the information you provided. Locate the client from the table and confirm that you are authorized to make changes on the client’s behalf. Then, confirm an **Online Allocation** is available.

If an online allocation is available, click **YES** to open the **Strategy Allocation** page.

If this cell is marked **NO**, you will need to get authorization to make changes on the client’s behalf before proceeding.

Authorized	Online Allocation Available
YES	<div>YES</div>

Editing Strategy Allocations For Current Funds

On the **Renewal Strategy Selection** page, you can view current strategy allocations for the displayed term and make changes. To edit allocations for current funds, click **Edit Strategy Allocation**. Next, select **Click To Reallocate Funds** to edit the percentage fields. The total must equal 100%.

To begin editing allocation percentages, click **Edit Strategy Allocation**.

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Submit Business +

End of Term Renewal Allocations

Existing Window Allocation

Term End Date: 11/20/2022

Original Payment Date(s)	Term Begin Date	Strategy	Term End Date
11/20/2018	11/20/2021	1-Year Declared Rate	11/20/2022
		GLD 1-Year Point-to-Point	
		Real Estate ETF 1-Yr Pt-to-Pt	
		S&P 500 1-Year Point-to-Point	
		S&P 500 Risk Ctrl 10% 1YR PTP Par	
		S&P Retiree Spending 1Yr PTP Par	
		S&P500 1-Year Monthly Sum	

[View New Deposit Allocations](#)

[Edit Strategy Allocation](#)

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Feedback

Select **Click To Reallocate** to edit the percentage fields.

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Term End Date: 11/20/2022

Original Payment Date(s)	Term Begin Date	Strategy	Term End Date
11/20/2018	11/20/2021	1-Year Declared Rate	11/20/2022
		GLD 1-Year Point-to-Point	
		Real Estate ETF 1-Yr Pt-to-Pt	
		S&P 500 1-Year Point-to-Point	
		S&P 500 Risk Ctrl 10% 1YR PTP Par	
		S&P Retiree Spending 1Yr PTP Par	
		S&P500 1-Year Monthly Sum	

[View New Deposit Allocations](#)

[Submit](#) [Cancel](#)

[Back to Results](#)

Click To Reallocate

New %

%

%

%

%

%

%

%

Feedback

Next, enter the new percentages for each strategy. Note the total must equal 100%.

Editing Strategy Allocations For Current Funds (Continued)

If at any point you would like to revert back to the current allocations, select **Keep Current Allocations**. If you would like to proceed with the new allocations, click **Submit** to finalize your changes.

Select **Keep Current Allocations** to cancel any changes and revert to the initial percentages.

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Term End Date: 11/20/2022

Original Payment Date(s)	Term Begin Date	Term End Date	
11/20/2018	11/20/2021	11/20/2022	Click To Make No Changes
Strategy		Current %	New %
1-Year Declared Rate		0	<input type="text" value="0"/> %
GLD 1-Year Point-to-Point		0	<input type="text" value="0"/> %
Real Estate ETF 1-Yr Pt-to-Pt		0	<input type="text" value="0"/> %
S&P 500 1-Year Point-to-Point		100	<input type="text" value="0"/> %
S&P 500 Risk Ctrl 10% 1YR PTP Par		0	<input type="text" value="0"/> %
S&P Retiree Spending 1Yr PTP Par		0	<input type="text" value="0"/> %
S&P500 1-Year Monthly Sum		0	<input type="text" value="0"/> %

One or more strategies must be allocated, and the transfer percentage must equal 100%.

[View New Deposit Allocations](#)

Submit



Cancel

To finalize your changes, click **Submit**. You will not be able to edit allocations once they are submitted.

Any updates to strategy allocations for current funds will only apply for the single term displayed on the page and will affect any funds accepted on the **Original Payment Date(s)** noted on-screen.

If no action is taken, strategy values will not rebalance but will begin a new term in the same strategy(ies).

Once you've submitted the changes, all funds will be allocated to the selected strategies based on the percentages entered.

Note: You will not be able to edit strategy allocations after submitting them. It is important that you review your updates before clicking **Submit**.

Editing Strategy Allocations For Future Contributions

To update how future purchase payments will be allocated, click **View allocations for future contributions**. This will open a drop-down form that you can update by following the steps on the previous page.

Allocations noted in this section will apply to all future purchase payments.

Click Submit to finalize any changes to this section. Likewise, you can click **Keep Current Allocations** to cancel your updates.

Click **View allocations for future contributions** to open a drop-down form where you can edit strategy allocations for all future purchase payments.

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▼ View New Deposit Allocations

New Deposit Allocations
New Deposit Window Allocation

Strategy	Current %	New %
1-Year Declared Rate	0	<input type="text"/> 0 %
GLD 1-Year Point-to-Point	0	<input type="text"/> 0 %
Real Estate ETF 1-Yr Pt-to-Pt	0	<input type="text"/> 0 %
S&P 500 1-Year Point-to-Point	100	<input type="text"/> 0 %
S&P 500 Risk Ctrl 10% 1 Yr PTP Par	0	<input type="text"/> 0 %
S&P Retiree Spending 1 Yr PTP Par	0	<input type="text"/> 0 %
S&P500 1-Year Monthly Sum	0	<input type="text"/> 0 %

0 %

Submit → Cancel

Feedback

Click **Submit** to finalize your changes. Allocations can't be updated once submitted.

If you have any questions or need assistance, please contact our Client Relations Team at 800-854-3649.

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