

RightBRIDGE Product Profiler Report Submission

REFERENCE SHEET

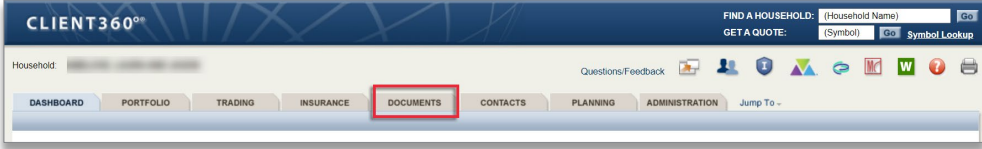
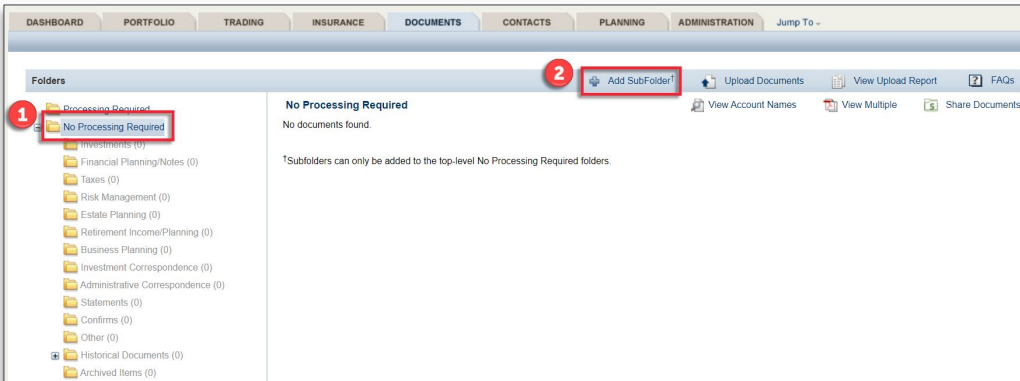
Overview

This document provides instructions for submitting, if requested as part of the review, the RightBRIDGE Product Profiler Report. If not requested, then maintain the RightBRIDGE Product Profiler Report in the client file. Submit one RightBRIDGE Product Profiler Report via Client360° per account because submitting for multiple accounts may cause processing delays, not in good order (NIGO) submissions, and/or lost forms. Please note the RightBRIDGE Product Profiler Report is not a client-facing document; thus, registered representatives (reps) cannot include it in the DocuSign envelop with paperwork sent to clients for signature.

Note: Please do not resubmit the full new business application package with a standalone RightBRIDGE Product Profiler Report or for NIGOS in which MMLIS requests the RightBRIDGE Product Profiler Report.

Note: Although reps may utilize RightBRIDGE to score fixed annuities and document their client files. Submission is not required for fixed annuity suitability; do not submit the report to MMLIS or fixed annuity order entry (FAOE). Maintain a copy of the report along with any other pertinent documentation in the client file.

Submitting the RightBRIDGE Product Profiler Report for Review

Step	Action
1.	Locate the client household in Client360°.
2.	Select the Documents tab . 
3.	The Documents tab displays. Select the No Processing Required folder then select Add SubFolder . 

For Broker Dealer Training Use Only. Not for Use with the Public.

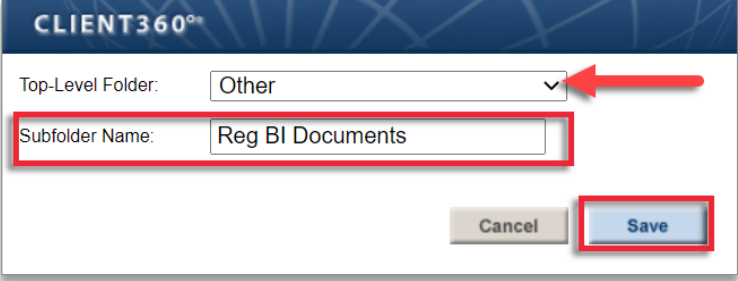
© 2022 Massachusetts Mutual Life Insurance Company (MassMutual), Springfield, MA 01111-0001.

All rights reserved. www.massmutual.com.

MM674r1_48

Rev. 02/25/2022

RightBRIDGE Product Profiler Submission

Step	Action
4.	<p>A popup window displays.</p> <ol style="list-style-type: none">Use the Top-Level Folder dropdown menu to select Other.In the Subfolder Name field, type Reg BI Documents.Select Save. 
5.	<p>After refreshing, the screen will show the new Reg BI Documents subfolder under the No Processing Required/Other folder.</p> <ul style="list-style-type: none">Upload the RightBRIDGE Product Profiler Report to the Reg BI Documents subfolder.<ul style="list-style-type: none">For instructions on uploading documents, refer to the Advisor360° Documents User Guide.When uploading the report, use the naming convention for the Document Name and the key word RightBRIDGE to facilitate searching for the report. Recommended naming convention: RightBRIDGE + client first and last name + investment purpose as stated in the report + downloaded + date downloaded. For example:<ul style="list-style-type: none">RightBRIDGE William Smith for Retirement downloaded 07/31/2021RightBRIDGE William and Anne Smith for Accumulate Wealth downloaded 07/31/2021RightBRIDGE William Smith for Preserve Wealth downloaded 07/31/2021