

Transitioning to the Account Opening Tool in Advisor360°

REFERENCE SHEET

In September 2022, the Advisor360° Client Account Wizard (CAW) will be replaced by a new Account Opening tool. This reference sheet provides an overview of the changes to New Business processes with the adoption of the Account Opening tool, as well as key features that are staying the same.

The Master Services Agreement and Eligibility for the Account Opening Tool

The Client Account Wizard is only available for accounts that can be opened with a Master Services Agreement (MSA). **This is still true for the Account Opening tool.** All registration types available within the CAW will be available for opening with the new Account Opening tool.

- **Note:** One new registration type is being added to this list. **NFS Brokerage Non-Prototype Plans** will be available within the Account Opening tool.

As a reminder, not all account types are eligible for the MSA and the Account Opening tool. For more information about the MSA, including eligibility, uses, and requirements, please consult the [Master Services Agreement Reference Guide](#), as well as the [MSA-Eligible Product Lines & Registration Types Reference Guide](#).

Accessing the Account Opening Tool

The CAW was accessible within the Procedures Wizard in Practice360°. You will access the Account Opening tool through **Client360°** instead.

To Access the Account Opening tool through Client360°:

1. In Client360°, navigate to the client's Household.
2. On the **Portfolio > Account Profile** tab, click **+ Create Account**.

Note: If you're using Client360° Beta/New Advisor Experience, the path to the Account Opening tool is slightly different.

- To access the Account Opening tool via Client360° Beta/New Advisor Experience, navigate to a household. Then, click the **Shortcuts** dropdown. Under **Launch**, select **Account Opening**.

For more detailed information, please consult the [Open New Accounts Using the Account Opening Tool](#) reference guide.

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Using the Account Opening Tool with New Clients

Since the Account Opening tool is accessed through a household in Client360°, it will be necessary to create a new household for any new clients **before** using the Account Opening Tool to create a new account. In contrast, this is unnecessary in the Client Account Wizard.

To learn how to create a new household, refer to the [Open New Accounts Using the Account Opening Tool](#) reference guide.

Obtaining e-Signatures with DocuSign

In the Account Opening tool, all client forms eligible for e-signature will be pushed to DocuSign to create the envelope that is sent to the MMLIS Home Office for processing. This is a change that simplifies the process from the Client Account Wizard, where users were required to download and upload forms manually.

For more information, please consult the [Advisor360° DocuSign Reference Guide](#).

Submitting Other Materials Related to New Business

The process for submitting wet-signed forms and other account-related documents is **not** changing. Documents may still be submitted electronically within Advisor360° by uploading them to the Documents Processing Folder.

Checking the Status of New Business

The process for checking the status of new accounts is **not** changing.

Representatives may check the status of new business created with the Account Opening tool in the same locations as before:

- The **Cases Tab** in Practice360°, which displays the Home Office processing status of all work
- The **Cases Widget**, which can be added to the Advisor360° main dashboard

Accessing the Client Account Wizard during the Transition to the Account Opening Tool

For a period of time after the adoption of the Account Opening tool, you will still be able to access the Client Account Wizard through the Procedures Wizard in Practice360°. This is to ensure a smooth launch and continuity of service.

However, you are encouraged to use the Account Opening tool for all applicable new business, as the Client Account Wizard will be retired. You will receive more details about the transition.