

## Life and DI New Business & Underwriting Key Dates

Monday, Nov. 25	<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) to ensure adequate processing time and delivery by the <b>final commission close Dec. 17, 2024 for business credit.</b></p> <p>*Inclusive of completed contracting and onboarding. Please contact Advisor Services at <a href="mailto:MMSDBrokerServicesInquiry@MassMutual.com">MMSDBrokerServicesInquiry@MassMutual.com</a> for assistance.</p>
Thursday, Nov. 28	<b>Thanksgiving Day. MassMutual offices closed.</b>
Friday, Nov. 29	<b>MassMutual offices close at 1:00pm ET.</b>
Friday, Dec. 6	<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 to MMSD Life Underwriting in time to review for <b>final commission close Dec. 17.</b></p> <p>*If exams or lab test findings prompt the need for an APS then additional processing time will be required.</p> <p><b>Underwriting requirements (including DI contract changes and life term conversions):</b> This is the last day to submit in good order underwriting requirements to the MassMutual Corporate Office to ensure policy pages are available for timely delivery and payment before the <b>final commission close Dec. 17.</b></p> <p><b>We will continue to work diligently through year end on Dec. 31, 2024 to handle requirements as they are received and make our best efforts to help you place those cases in 2024.</b></p>
Friday, Dec. 13	<b>Life and DI New Business issue requirements:</b> This is the last day to submit issue requirements to the Home Office to ensure the case is issued <b>for Dec. 17 commission close.</b>
Tuesday, Dec. 17	<p><b>Final Commission Close for 2024 commission payment.</b></p> <ul style="list-style-type: none"> <li>• <b>Inbound wires</b> will need to arrive by 4:00pm ET on this day to apply.</li> <li>• <b>For firms on DTCC</b>, the last DTCC COM cycle of the year is Dec. 31, 2024.</li> </ul>
Thursday, Dec. 19	<p><b>Life and DI New Business issue requirements</b></p> <p>This is the last day to submit issue requirements to the Home Office to ensure the case is issued <b>for Dec. 31. year-end close of business.</b></p>
Tuesday, Dec. 24	<b>MassMutual offices close at 1pm ET.</b>
Wednesday, Dec. 25	<b>Christmas Day observed. MassMutual offices closed.</b>
Thursday, Dec. 26	<p><b>Delivery requirements and initial premium payments:</b> Submit in good order delivery requirements and payment to place case to be credited for 2024 business and to place case by Dec. 31 to be included on final DTCC COM cycle for 2024.</p> <p>DTCC Settlement is Monday through Friday. The last COM file and settlement for the year is Dec. 31. Commissions processed on Dec. 31, 2024 would settle on Jan. 2, 2025.</p>
Tuesday, Dec. 31	<b>The last DTCC COM cycle of the year.</b>