



MassMutual Quick Connect Videos

Vern Carlson – Helping to Create More Predictable Outcomes for Clients

Episode 1

Title: How Much Do I Need

Description: Watch this video to hear Vern Carlson, National Sales Manager for Life Insurance at MassMutual Strategic Distributors discuss how much clients may need in their retirement journey and how financial professionals can illustrate the importance of this savings.

Link: <https://vimeo.com/944972280/5bf1a6ed5b?share=copy>

Episode 2

Title: Wealth Management Risks

Description: Watch this video to hear Vern Carlson, National Sales Manager for Life Insurance at MassMutual Strategic Distributors discuss pre-retirement and retirement risks for clients, and how creating a portfolio of insurance can help to solve client needs over their wealth management life cycle.

Link: <https://vimeo.com/944980444/ed4ee44b56?share=copy>

Episode 3

Title: Dynamic Spending

Description: Watch this video to hear Vern Carlson, National Sales Manager for Life Insurance at MassMutual Strategic Distributors discuss how clients should vary the rate of their withdrawal in retirement based on portfolio performance, and how clients should consider adding a non-correlated asset like participating whole life insurance to that portfolio.

Link: <https://vimeo.com/945599610/3e7224205c?share=copy>

Episode 4

Title: Diversification

Description: Watch this video to hear Vern Carlson, National Sales Manager for Life Insurance at MassMutual Strategic Distributors discuss how participating whole life insurance may provide clients with a diversified financial solution that is not subject to the same interest inflation and market volatility as other assets they may own.

Link: <https://vimeo.com/945601173/8925864d30?share=copy>

Josh Lubas

Episode 1

Title: Your Client's Most Valuable Asset

Description: Watch this video to hear Josh Lubas, National Sales Manager for Disability Insurance at MassMutual Strategic Distributors discuss why a client's ability to earn an income is their most valuable asset.

Link: <https://vimeo.com/932545680/f8d0b55e8c?share=copy>

Episode 2

Title: Disability Income Insurance Gap

Description: Watch this video to hear Josh Lubas, National Sales Manager for Disability Insurance at MassMutual Strategic Distributors discuss the truth about the DI insurance gap and how to help clients close it with MassMutual's Radius Choice® solution.

Link: <https://vimeo.com/932545579/04a6bb2977?share=copy>

Episode 3

Title: Savings & Disability

Description: Watch this video to hear Josh Lubas, National Sales Manager for Disability Insurance at MassMutual Strategic Distributors break down how a client's years of savings can be jeopardized in just one year of being too sick or hurt to work.

Link: <https://vimeo.com/932545488/eba4e2afb1?share=copy>

Episode 4

Title: Odds of Needing Disability Income Insurance

Description: Watch this video to hear Josh Lubas, National Sales Manager for Disability Insurance at MassMutual Strategic Distributors discuss what the actual odds are of a client becoming too hurt or sick to work and how to help protect their ability to earn an income.

Link: <https://vimeo.com/932545535/8fb7fb85b8?share=copy>

Lina Storm

Episode 1

Title: The Connelly Decision: A Catch-22

Description: Watch this video to hear Lina Storm, MMSD Director of Sales Enablement, discuss the implications of the Connelly case and why it may now be prudent for clients to avoid entity buy-sell arrangements funded with life insurance.

Link: <https://vimeo.com/961633373/b0b75d0d73?share=copy>