Client Medical Interview

Welcome to the Client Medical Interview (CMI) – electronic process.

Utilizing the CMI allows MassMutual to:

- Collect information directly from our applicants
- Ensure information is secure and accurate
- Decrease underwriting decision making time

The CMI is designed to be completed in four easy steps. The following information will guide you through the simple process.

Before you Begin

During the process you'll be asked questions about your health history, including conditions you may have experienced and the treatments you have received. Preparation is the key to making your experience as efficient as possible.

Helpful Hint!

Have available before you begin:

- List of all current medications
- Physicians' names and addresses

If you need to end your session before submitting your signatures, you can log back into the secure website and begin where you left off. As an added layer of security you will be presented with a security question. You may also print a copy of your CMI at any point during the process.

Be assured the security of your personal information is of the utmost importance to MassMutual. The system you will be accessing is a secure website designed to protect your personal information and is used strictly to process your MassMutual insurance application.

Client Medical Interview in 4 Easy Steps

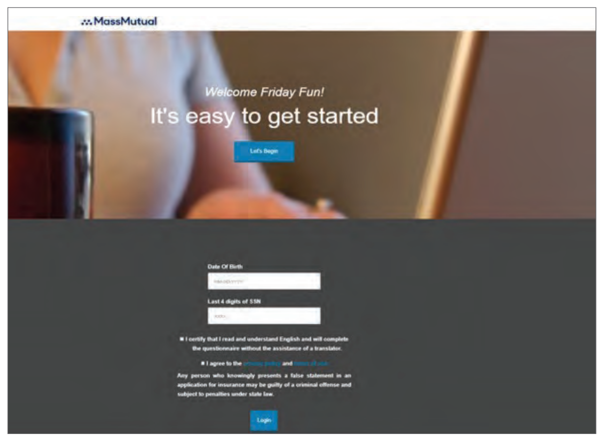
Let’s Get Started …

Step 1 | Accessing the Site

- Open the email sent by your MassMutual Financial Professional and select the link to our secure site.
- Choose “Let’s Begin.”
- The link to complete the CMI will remain active for seven days. Contact your Financial Professional if the link has expired.

Step 2 | Authenticate Your Identity

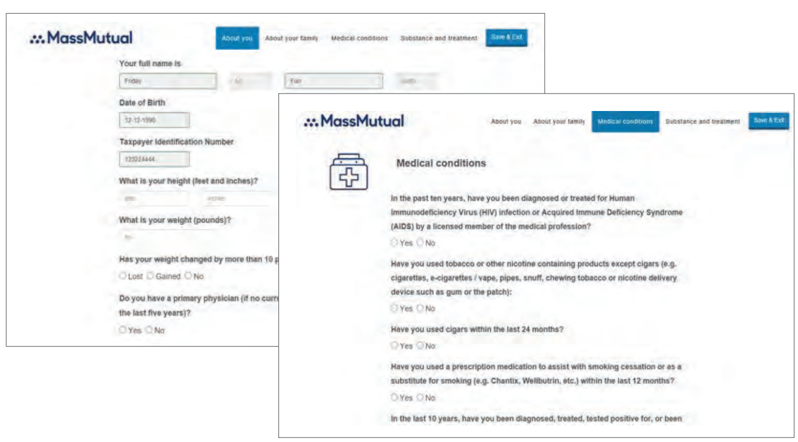
- Enter your date of birth and the last 4 digits of your Social Security number
- Review and agree to the privacy policy terms of use (you must check the box acknowledging that you agree in order to continue).
- Select a security question and provide an answer. You will be asked to answer this question if you need to log back in before completing your submission.



Step 3 | Complete the Client Medical Interview

Question categories include:

- About you
- About your family
- Medical conditions
- Substance and treatment



Depending on how you answer the Client Medical Interview questions, additional questions may appear to gather further details. Once you have completed all of the questions, click **“Sign and Submit.”**

Step 4 | Review Form and Submit Your Signatures

Read and acknowledge the Electronic Records and Signature Disclosure by **checking the box "I agree to use electronic records and signatures"** and then click **"Continue."**

Review your Client Medical Interview application to ensure all the information is accurate.

Helpful Hint!

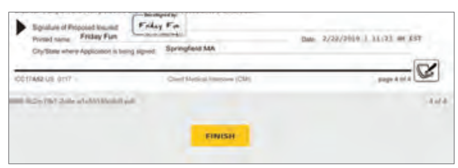
Scroll to the bottom of the page and review each section. If you find an incorrect answer you may edit by selecting "Go Back," and you will return to the question to make corrections.

To proceed to sign and submit:

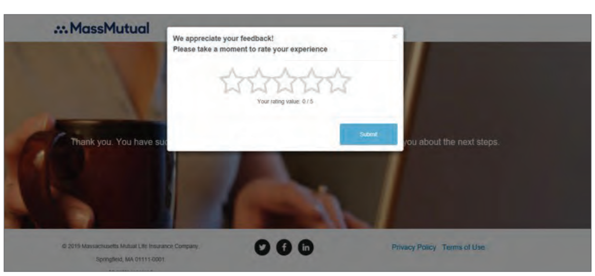
- **Select "Sign"** to begin affixing your electronic signature on the CMI application.

- **Choose "Adopt and Sign"**

- **Choose "Finish"** to complete the submission process.
- A confirmation screen will appear, and you may close your web browser.



You will receive an email message to confirm the completion of the Client Medical Interview, and your agent will reach out to you regarding the next steps.



If you have additional questions about the Client Medical Interview, please contact your MassMutual Financial Professional.

MassMutual...

Helping you secure what matters most.

Since 1851, our business decisions have been guided by our customers' needs. Today, we offer a wide range of financial products and services to help people secure their future and protect the ones they love.

Learn more at **www.MassMutual.com**

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