



FOR IMMEDIATE RELEASE
August 19, 2009

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MassMutual Celebrates Positive First-Year Results of First Mercantile Acquisition

(Springfield, Mass.) – MassMutual recently marked the first anniversary of its acquisition of Memphis-based First Mercantile Trust with strong sales and record-high customer retention rates. First Mercantile provides retirement plan recordkeeping and investment management services throughout the U.S., and was acquired by MassMutual last year in a strategic move to expand its product offering with collective trust and ETF investments and strengthen its retirement plan distribution among registered investment advisors.

“First Mercantile’s vision to be the premier collective investment trust recordkeeper in the United States is well underway,” says Ian Sheridan, president, First Mercantile. “Our year-to-date sales are up 66% over the same period last year, and client retention rates are at a record high of 96%. These results help affirm that we are doing the right things to help our customers and the investment professionals who support them achieve their own measures of success.”

Several major product enhancements were shared at First Mercantile’s annual conference earlier this year, at which time the company outlined its commitments to its network of investment professionals, growth of the First Mercantile sales force, and technology enhancements to support overall growth and customer needs.

“The First Mercantile team actively and successfully managed customers’ expectations during the transition and throughout the turmoil in the financial markets. The team’s professionalism and passion will help us continue the positive momentum that First Mercantile is experiencing,” adds Elaine Sarsynski, executive vice president of MassMutual’s Retirement Services Division and chairman and CEO of MassMutual International LLC. “We are excited about the possibilities as we head into our second year.”

For more information about MassMutual Retirement Services, please contact your local MassMutual sales representative or call MassMutual at 1-888-626-4911. For more information about First Mercantile, please contact your First Mercantile representative or call First Mercantile at 1-800-753-3682.

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About MassMutual

MassMutual's Retirement Services Division has been serving retirement plans for more than 60 years. It offers a full range of products and services for corporate, union, nonprofit and governmental employers' defined benefit, defined contribution and nonqualified deferred compensation plans. It serves approximately one million participants.

Founded in 1851, MassMutual is a leading mutual [life insurance company](#) that is run for the benefit of its members and participating policyholders. The company has a long history of [financial strength](#) and strong performance, and although dividends are not guaranteed, MassMutual has paid dividends to eligible participating policyholders every year since the 1860s. With [whole life insurance](#) as its foundation, MassMutual provides products to help meet the financial needs of clients, such as [life insurance](#), [disability income insurance](#), [long term care insurance](#), [retirement/401\(k\) plan services](#), and [annuities](#). In addition, the company's strong and growing network of financial professionals helps clients make good financial decisions for the long-term.

MassMutual Financial Group is a marketing name for Massachusetts Mutual Life Insurance Company (MassMutual) [of which Retirement Services is a division] and its affiliated companies and sales representatives. MassMutual is headquartered in Springfield, Massachusetts and its major affiliates include: Babson Capital Management LLC; Baring Asset Management Limited; Cornerstone Real Estate Advisers LLC; The First Mercantile Trust Company; MassMutual International LLC; MML Investors Services, Inc., member [FINRA](#) and [SIPC](#); OppenheimerFunds, Inc.; and The MassMutual Trust Company, FSB.

For more information, visit massmutual.com.

About First Mercantile

First Mercantile, a member of MassMutual Financial Group, is one of the premier collective investment trust (CIT) record keepers in the United States. It offers investment solutions exclusively for qualified retirement plans. Employing a due diligence process, First Mercantile searches the investment universe to select non-proprietary options suited for its investment platforms. CITs are sub-advised by institutional money managers, or invest in mutual funds or exchange traded funds (ETFs). Also included on the investment platform are DFA Funds, Lifestyle and Target Date options. First Mercantile acts in a fiduciary capacity with respect to the management of the assets of the collective investment trusts. The Advisor Review Committee oversees the entire due diligence process, which includes qualitative and quantitative analysis.

Its investment products are distributed through solid relationships with quality investment professionals and third party administrators. First Mercantile offers full fee disclosure and transparency with a flexible and competitive cost structure. It has a national network of seasoned, knowledgeable professionals to provide excellent client service, customer care and support.

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RS: 17778-00