

CHARTER OAK

Insurance and Financial Services Co.

A Member of the MassMutual Financial Group

FOR IMMEDIATE RELEASE

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**Charter Oak Insurance and Financial Services Co.
Marks 125 Years of Local History**
June 1 “Birthday” to Kick Off Yearlong Celebration

Holyoke, MA—Charter Oak Insurance and Financial Services Co. (Charter Oak) is pleased to announce its 125th year of doing business in greater Springfield. A series of celebrations and related events will be held throughout the course of the year in honor of this milestone.

The agency, which was originally known as Massachusetts Mutual Life Insurance Company’s (MassMutual) Springfield Agency, appointed its first general agent on June 1, 1886.

As the local MassMutual agency, Charter Oak expanded into Connecticut—and became known as the Hartford/Springfield agency—when MassMutual merged with Connecticut Mutual Life Insurance Company in 1996. This expansion continued throughout the early 2000s with the addition of offices in Southbury, Hamden and Stamford.

Charter Oak’s Western Massachusetts presence has stayed close to its Springfield roots; the agency’s growth, combined with shifting client demographics and an increased regional focus led to a move to Holyoke in 2008.

The agency officially became Charter Oak in 2007.

In its 125 years of history, Charter Oak’s leadership has changed hands only six times, including the appointments of current General Agents Peter Novak and Brendan Naughton. The agency’s longevity has also been marked by success. Charter Oak is a perennial winner of MassMutual’s prestigious Chairman’s Trophy Award, and its agents and leadership are regularly recognized both within MassMutual and by leading industry organizations.

Pete Novak, General Agent of Charter Oak, said: “Over the course of 125 years, this agency has weathered some of history’s great economic storms. The fact that we continue to grow and thrive is testament to the strength of our leadership, our people and to the integrity of the products and services we provide. We are proud to celebrate such a remarkable milestone.”

Brendan Naughton, General Agent of Charter Oak, said: "It is an honor to lead an organization with such a rich history. We strive every day to preserve the legacy of our predecessor general agents, and to continue to serve the original intentions MassMutual set for us in 1886."

MassMutual is also celebrating an anniversary this year. The company has been in existence for 160 years.

Charter Oak Insurance and Financial Services Co. is a general agency of Massachusetts Mutual Life Insurance Company (MassMutual) and serves the risk management, business services and retirement and investment planning needs of more than 70,000 clients throughout the northeast. With offices in Farmington, Hamden, Holyoke, Southbury and Stamford, Charter Oak considers helping others the heart of its business and is proud to support many philanthropic organizations in all of the markets it serves. To learn more, visit www.charteroakfinancial.com.

Securities, investment advisory and financial planning services offered through qualified registered representatives of MML Investors Services LLC, member SIPC, 76 Batterson Park Road, Farmington, CT 06032. Tel: 860-674-1800.

MassMutual Financial Group is a marketing name for Massachusetts Mutual Life Insurance Company (MassMutual) and its affiliated companies and sales representatives.

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