



MDRT

The Premier Association of
Financial Professionals®

OVERVIEW

2013



President D. Scott Brennan
at the 2012 Annual Meeting

2012 MDRT QUICK FACTS

AS OF AUGUST 1, 2012

Members	37,805
Companies represented	459
Nations and territories represented	76
Female members	15,535
Members from United States	10,393
Members from outside United States	27,412
Court of the Table	5,171
Top of the Table	1,831

DEAR FRIENDS OF MDRT:

I am pleased to share with you the 2013 Million Dollar Round Table (MDRT) Overview. This booklet contains information about some exciting new initiatives underway, as well as updated statistics and information about MDRT's membership.

As President of MDRT, I am honored to lead an organization dedicated to developing resources for our members to help them work more effectively and efficiently, balance their professional and personal pursuits and most importantly, better serve their clients.

This year, we have two new initiatives that will help MDRT members increase their productivity while finding balance in their lives. The Bottom Line Task Force will help producers maximize their net profit by identifying the best practices of high-profit agencies. We are also going to bring the Whole Person concept to a new level with the Task Force for a Big Life. The task force will gather advice and tips from members who have operated successful businesses without sacrificing their family and community time.

In addition, MDRT will be providing our members with more information about succession planning. This has become an important topic in the financial services arena, and we hope to offer practical and timely information that can help members plan for their future.

In this book, you will see what some of our members say about the benefits of MDRT membership and learn a little more about the history of the organization.

MDRT will continue to seek new ways to address the needs of our current members and keep them informed about industry trends. We also are reaching out to a new generation of advisors to make sure they can succeed and thrive in this great profession.

I would like to thank you for your support of MDRT.

D Scott Brennan

D. Scott Brennan
MDRT President

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1954

MDRT HISTORY FACT

At the 1954 Annual Meeting, a new format for exchanging ideas was introduced. To maximize participation by attendees, MDRT members and industry executives acted out a “Case Study in Dramatic Episode” in extensive detail. Today, members share ideas not only at the Annual Meeting, but through the MDRT Network—to date, more than 3,000 members have joined the conversations at this members-only online social network. In addition, MDRT has established a social media presence with 6,701 Facebook fans, almost 3,000 followers on Twitter and nearly 4,000 LinkedIn group members.

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2013 MDRT EXECUTIVE COMMITTEE

MDRT is governed and managed by a five-member Executive Committee duly elected each year by the membership. The 2012–2013 MDRT Executive Committee includes:



D. SCOTT BRENNAN of South Bend, Indiana, USA, is MDRT President and a 29-year MDRT member with one Top of the Table and eight Court of the Table qualifications. A dedicated MDRT leader, Brennan served as Divisional Vice President of Business and Educational Services in 2000 and Membership Services in 1998. He has also chaired several MDRT committees and task forces. He is a Platinum Knight of the MDRT Foundation and served on the Foundation Board from 2004 to 2006. Brennan's industry awards include the 2003 and 2004 MassMutual Indiana Agent of the Year, the 1998 National Association of Insurance and Financial Advisors Indiana Life Underwriter of the Year, and the 1994 South Bend Agent of the Year.



JENNIFER A. BORISLOW, CLU, of Methuen, Massachusetts, USA, is MDRT's Immediate Past President and a 24-year MDRT member. Her commitment to the Round Table is evident in numerous distinctions and volunteer positions. She has qualified for one Court of the Table and 14 Top of the Table honors, and in 2005, she became the first woman to preside over Top of the Table. She is a frequent MDRT Annual Meeting speaker and has served as Divisional Vice President of Finance and Communications. In addition, Borislow is an Excalibur Knight of the MDRT Foundation. She is the founder and principal of Borislow Insurance Agency Inc., where her team of 30 employees handles employee benefits for more than 400 corporate clients. Borislow Insurance was recently recognized by the *Boston Business Journal* as one of the best places to work and healthiest employers in Massachusetts in 2011.



MICHELLE L. HOESLY, CLU, CHFC, of Norfolk, Virginia, USA, is MDRT's First Vice President and a 33-year MDRT member with three Court of the Table and nine Top of the Table qualifications. Her commitment as a volunteer with the Round Table began in 1983 and is highlighted by her leadership in three Divisional Vice President roles: 1996 Annual Meeting Program Development Committee, 2003 Communications and, most recently, 2009 Top of the Table Chair. She has attended 30 Annual Meetings and is a Platinum Knight of the MDRT Foundation, and served on its Board of Trustees from 2005 to 2007. Hoesly is an internationally recognized speaker who has spoken at several MDRT Annual Meetings, as well as MDRT's Boomertirement Industry Summit in 2007. In 1985, she joined three other MDRT members in establishing the Make-A-Wish Foundation of Eastern Virginia and served as president of its founding board.



CAROLINE BANKS, APFS, is one of Europe's best-known financial advisors. A 23-year MDRT member with 18 Top of the Table qualifications, she is also a Diamond Knight of the MDRT Foundation, and she has spoken at several MDRT Annual and Experience meetings. A past winner of the U.K.'s Financial Adviser of the Year award, she heads Caroline Banks & Associates, a London-based firm she founded in 1994. The firm is one of the first to earn the prestigious CFP designation, and it was included in the *Citywire* "Top 100," recognizing outstanding achievements in the U.K. financial advice community.



BRIAN D. HECKERT, CLU, CHFC, of Nashville, Illinois, USA, is MDRT's Secretary. He is a 24-year MDRT member with seven Court of the Table and five Top of the Table qualifications. He is also a Platinum Knight of the MDRT Foundation and a member of its Inner Circle Society. Heckert is president of Financial Solutions Midwest LLC, an independent financial services practice. His Round Table volunteerism includes speaking at the MDRT Annual Meeting and MDRT Experience meeting, as well as service on multiple MDRT committees and task forces. Heckert is a frequent industry speaker and has been quoted in numerous business, industry and association publications.

2012 Membership Year

2012-2013 MDRT MANAGEMENT COUNCIL

MDRT's Management Council is MDRT's leadership team and comprises the Executive Committee, MDRT Foundation President and a Divisional Vice President from each of the following areas:

Annual Meeting Program Development	Ross Vanderwolf, CFP
Annual Meeting Program General Arrangements.....	Scott Roger Lebin, RFC
Finance.....	Peter H. Dodd, MSFS, CLU
Member Communications One	Anand A. Jathan, RFC, Cert CII
Member Communications Two	Dorin Roxana Israelian
Membership and Leadership.....	Michael J. McNeil, CLU, ChFC
Special Projects	Timothy M. Reis, LUTCF
Innovation	Charles E. McDaniels, CLU, ChFC
Top of the Table	E. Dennis Zahrbock, CLU, CFP
Best Practices One (USA, Caribbean, Mexico, Central and South Americas).....	Hamilton P.B. Poynor, CLU, AEP
Best Practices Two (People's Republic of China, Taiwan, Japan, Republic of Korea, Southeast Asia, Hong Kong, Macau)	Deddy Karyanto, CFP, QWP
Best Practices Three (India, Pakistan, Sri Lanka, Oceania, Europe, Middle East and Africa)	Godfrey Phillips, FChFP, JP
President, MDRT Foundation	Gilbert A. Haggart, CLU, LUTCF (ex-officio)

MEMBERSHIP QUALIFICATIONS

Production Levels

To qualify for MDRT membership, prospective members must adhere to the highest ethical standards and meet specific production requirements, which are increased annually. Members and prospective members must submit a membership application each year. Additionally, each member must belong to at least one recognized financial/insurance association, provided one exists in the member's country.

Qualifications for the 2013 table, based on 2012 production, are to the right. Court of the Table and Top of the Table serve as additional incentives for members to increase their levels of production, leading to additional recognition and access to exclusive benefits.

MDRT

USD 90,000 of eligible commissions,
USD 180,000 of eligible premium or
USD 154,000 income

COURT OF THE TABLE

USD 270,000 commission,
USD 540,000 premium or
USD 462,000 income

TOP OF THE TABLE

USD 540,000 commission,
USD 1,080,000 premium or
USD 924,000 income

MEMBERSHIP CATEGORIES

Qualifying

An individual who is a first-time applicant becomes a Qualifying (Q) member when his or her application and certifying letters are approved. Until the 10th year of membership is attained, the member will be a Qualifying member.

Qualifying and Life

One becomes a Qualifying and Life (QL) member when approved for the 10th year of membership. Qualifying and Life status is maintained in future years by submitting certified production with the membership application.

Life

Once Qualifying and Life membership has been attained, a member may choose to apply as a Life (L) member by not including certified production with the membership application. Life members must annually submit an application and pay dues.

“MDRT will inspire and motivate you to achieve higher levels of productivity. More importantly, it reminds me of why we do what we do. Of course we have to make a living, but MDRT reminds me that I make a living out of changing lives for the better.”

—Dean Gareth Hobbs
Seven-year MDRT member, Oxon, England

1928

In 1928, Eleanor Young Skillen was the first woman to join MDRT. Today, MDRT has more than 15,000 female members, three of whom serve on the MDRT Executive Committee.

2012 MEMBERSHIP BY COUNTRY

1. United States.....	10,393
2. Republic of Korea	6,307
3. Japan	3,777
4. India	3,265
5. Hong Kong SAR	2,857
6. Taiwan R.O.C.	2,231
7. P.R. China	2,023
8. Canada.....	959
9. Malaysia	935
10. Singapore.....	749

2012 TOP 10 MULTINATIONAL COMPANIES

1. Samsung Life Insurance Co. Ltd.	Republic of Korea	2,667
2. MetLife	United States	2,636
3. New York Life	United States	2,566
4. Prudential	United States	2,297
5. AIA Group Ltd.....	Hong Kong	2,132
6. Life Insurance Corporation of India	India	1,471
7. Prudential plc	England, U.K.....	1,233
8. AXA Group.....	France	1,120
9. Manulife Financial Corporation	Canada	895
10. ING Group	Netherlands	810

“MDRT has allowed me to interact with advisors from all over the world and adopt their best ideas into my business. My practice now runs more efficiently and effectively because of the relationships I have developed through MDRT.”

–Clay Gillespie, CFP, CIM
11-year MDRT member, Vancouver, British Columbia, Canada



2012 MEMBERSHIP STATISTICS (GLOBAL)

	ALL MDRT MEMBERS*	MDRT ONLY	COURT OF THE TABLE ONLY	TOP OF THE TABLE ONLY
TOTAL MEMBERS	37,805	32,528	3,446	1,831
QUALIFYING MEMBERS	34,579	29,394	3,446	1,739
COMMISSIONS				
AVERAGE	\$209,237	\$149,065	\$338,123	\$790,688
MEDIAN	\$135,060	\$121,810	\$314,069	\$643,277
COMMISSIONS (PER CASE)				
AVERAGE	\$1,187	\$961	\$2,319	\$1,701
MEDIAN	\$1,519	\$1,328	\$4,043	\$8,237
CASES (LIVES)				
AVERAGE	150	122	157	575
MEDIAN	73	71	79	93
PREMIUMS				
AVERAGE	\$481,084	\$287,490	\$822,560	\$3,381,024
MEDIAN	\$243,959	\$220,856	\$656,075	\$1,501,867

All dollars in USD.

*Includes Court of the Table and Top of the Table.

“Organizations like MDRT add remarkable value in providing access to resources and tools to help members become more successful in growing their businesses.”

–Jennifer A. Borislow, CLU
24-year MDRT member, Methuen, Massachusetts, USA

WHAT'S NEW AT MDRT

Business Succession Planning Microsite

The members-only Succession Planning Decision Tree at www.mdr.org helps members take the first step in preparing to establish a business continuation plan. The site explores the emotional aspects involved in making the decision to transition one's practice and the practical information that every advisor needs to know throughout the process.

Expanded Translation and Interpretation

To accommodate MDRT's growing and diverse membership, MDRT has increased its efforts to translate materials, which includes offering the MDRT website, www.mdr.org, in six languages; distributing Connect e-newsletters in 17 languages; translating the MDRT Annual Meeting program book into five languages and providing simultaneous interpretation at the meeting in 16 languages; and offering *Round the Table* magazine in nine languages.

GAMA and NAILBA Partnerships

In recognition of the influence that distribution channel management has in the development of the financial services industry, MDRT has partnered with GAMA and NAILBA on various initiatives to reach a wider pool of producers. These partnerships raise awareness, help stimulate and grow the MDRT culture within agencies, and create value for both distribution leaders and their producers.

MDRT Talk Segments

MDRT introduced a new way for members to connect through multimedia with MDRT Talk segments. These are brief audio pieces of members sharing their best sales and practice management ideas. Topics include discussion on disability insurance, serving clients in the "sandwich" generation, succession planning and more.



WHAT'S NEW AT MDRT continued

Annual Meeting ConneXion Zone

To help MDRT members maximize their time at the Annual Meeting, MDRT introduced the ConneXion Zone at the 2012 MDRT Annual Meeting. This dynamic environment allows exhibitors to demonstrate products, ideas and services to a small group of members or one on one. Meeting attendees can also see Focus Session previews, participate in a Q-and-A session with Main Platform speakers or meet with a study group. It also provides a place for members to network and hear short presentations from their fellow MDRT members.



1960

In 1960, *Round the Table* was launched as a four-page newsletter published on newsprint. Today, it is a colorful, 56-page bimonthly magazine printed in eight languages. A mobile format is also available for viewing on a tablet or Smartphone.

Additional Resources

MDRT also offers its members a multitude of tools and resources, including:

- **Round the Table** magazine – MDRT's bi-monthly magazine, featuring articles by members and industry experts, as well as timely and practical information members can use to improve their overall business.
- **MDRT Network** – An online, private social network where MDRT members can exchange ideas.
- **MDRT Connect** – A website where members can watch live streams of MDRT events, videos and webinars.
- **Mentoring Program** – Provides counseling, guidance and encouragement from a committed MDRT member to an aspiring MDRT qualifier. The two work together to advance the aspirant to MDRT-level productivity to attain MDRT membership.
- **Annual Meeting "Proceedings"** – Sent each year to members, the "Proceedings" book contains manuscripts of all presentations given at the MDRT Annual Meeting.
- **MDRT e-Newsletters** – Provide members with the latest information on MDRT and other industry events, as well as sales and practice management ideas.
- **The MDRT Store** – A one-stop-shop for the latest bestselling books, CDs, DVDs and educational materials for top performers. The store also offers insignia items, office accessories and membership plaques.
- **The Whole Person concept** – Since it is easy to lose touch with the other equally important aspects of life, such as family and community service, MDRT created the Whole Person concept and provides resources to help members achieve a balanced lifestyle.

Information about these resources and others can be found at www.mdrt.org.

MDRT MEETINGS

The MDRT Annual Meeting

The MDRT Annual Meeting is a one-of-a-kind event known for its inspiring Main Platform, educational Focus Sessions and entertaining special sessions and social events. Past speakers include Barbara Bush, Christopher Reeve and Sugar Ray Leonard. In addition, MDRT members share their inspiring stories — reminding attendees of the importance of the work they do. Perhaps most importantly, members can network with other top financial services professionals from around the world, building friendships and business relationships that last a lifetime. The next MDRT Annual Meeting will take place June 9–12, 2013, in Philadelphia, Pennsylvania, USA.

Top of the Table Annual Meeting

The Top of the Table Annual Meeting provides an opportunity for the world's leading financial producers to exchange advanced sales ideas and network. Nearly 300 Top of the Table members attended the 2012 Top of the Table Annual Meeting in Amelia Island, Florida, USA, from October 10–13. In 2013, the meeting will take place October 9–12 in Scottsdale, Arizona, USA.

MDRT Experience

This event, modeled after MDRT's Annual Meeting, delivers cutting-edge sales techniques and ideas, technical information and motivational concepts to both MDRT members and nonmembers. Past Experience meetings have taken place in Thailand, the Republic of Korea, Japan and Singapore. In 2013, the MDRT Experience will be held in Hyderabad, India, from February 21–23.

"It is an unbelievable resource of education, motivation and practice-building areas. MDRT represents the pinnacle of financial planning advisors in the world. It gives me the opportunity to mix with like-minded professionals from over 60 countries."

—Graham Poole, Dip All, Dip FP
37-year MDRT member, Newcastle, Australia



1940

The last time MDRT held the Annual Meeting in Philadelphia was in 1940. At the time, total MDRT membership was 154, and 87 members attended the Annual Meeting that year. There were just eight speakers for the one-day meeting.

MDRT CODE OF ETHICS

MDRT members should be ever mindful that complete compliance with and observance of the MDRT Code of Ethics shall serve to promote the highest quality standards of membership. These standards will be beneficial to the public and to the insurance and financial services profession. Therefore, members shall:

- 1 Always place the best interests of their clients above their own direct or indirect interests.
- 2 Maintain the highest standards of professional competence, and give the best possible advice to clients by seeking to maintain and improve professional knowledge, skills and competence.
- 3 Hold in the strictest confidence and consider as privileged all business and personal information pertaining to their clients' affairs.

- 4 Make full and adequate disclosure of all facts necessary to enable their clients to make informed decisions.

- 5 Maintain personal conduct that will reflect favorably on the insurance and financial services profession and MDRT.

- 6 Determine that any replacement of an insurance or financial product must be beneficial for the client.

- 7 Abide by and conform to all provisions of the laws and regulations in the jurisdictions in which they do business.

1931

In 1931, the first members from Japan joined MDRT. Today, MDRT has nearly 38,000 members from 76 nations. In 2012, MDRT had its first member from Portugal. In the past decade, MDRT has added members from Anguilla, Bangladesh, Bulgaria, Costa Rica, Czech Republic, Egypt, Lithuania, Nepal, Romania, Russia, Slovakia, Slovenia and St. Maarten.

1936

Past President Lester Rosen was an MDRT member for 71 years beginning in 1936—the most years of any member in MDRT's history.

MDRT FOUNDATION

FINANCIAL PROFESSIONALS
CHANGING LIVES WORLDWIDE™

The MDRT Foundation is the philanthropic arm of MDRT. The mission of the MDRT Foundation is to increase member and industry participation and to give funds to worthwhile charitable organizations throughout the world.

The MDRT Foundation provides a vehicle for MDRT members and corporate supporters to maximize their philanthropic efforts by funding life-changing grants that help children and families in need in communities around the globe.

Since its formation in 1959, the MDRT Foundation has awarded more than USD 28 million in grants to charitable organizations serving people in 67 countries and all 50 U.S. states.

The MDRT Foundation awards grants to support a diverse range of charitable causes that are important to MDRT members. However, to receive a grant, charitable organizations must meet the following criteria:

- * Endorsed by an MDRT member
- * Non-sectarian (unless program(s) serve community at large)
- * Responsibly managed
- * Appropriate fiscal accounting procedures employed
- * MDRT member and/or charity has not received a grant from the MDRT Foundation in the previous year
- * Classified as a charitable organization by their government (in United States, must be classified as a 501(c)(3) by the Internal Revenue Service)

Donor Recognition: Levels of Knighthood

The MDRT Foundation embodies the compassionate spirit of MDRT members. Foundation supporters are recognized as charitable leaders, and donors become Knights of the MDRT Foundation through cumulative lifetime gifts of USD 2,000 or more. Levels of Knighthood are:

Bronze.....	USD 2,000
Silver.....	USD 3,000
Gold	USD 5,000
Diamond.....	USD 10,000
Platinum.....	USD 25,000
Excalibur.....	USD 50,000
Legion of Honor Excalibur.....	USD 100,000
Royal Order Excalibur	USD 250,000

1969

In 1969, the Foundation made its largest-ever single grant of USD 1.5 million to The American College to fund MDRT Foundation Hall, an adult learning and research center.



MDRT FOUNDATION

GRANT PROGRAMS

Quality of Life Grant Program

This program recognizes the outstanding volunteerism of MDRT members actively involved in charitable organizations. Grants are awarded to charitable organizations in the name of the MDRT member selected as a Quality of Life award recipient. The MDRT Foundation's Grants Committee awards grants to the member's designated charity in increments of USD 3,500 (maximum of 20 grants awarded), USD 5,000 (three grants awarded), and USD 10,000 (two grants awarded). In addition, one grant in the amount of USD 25,000 is awarded to the designated charity in honor of the MDRT member whose volunteerism is selected as most exceptional by the committee.

In 2012, the MDRT Foundation awarded the top Quality of Life Award to 1997 MDRT President **John W. Cruikshank III, CLU**, for his volunteer work to promote awareness of the elder abuse prevention program operated by North Shore Senior Center, a nonprofit organization based in Northfield, Illinois, USA.

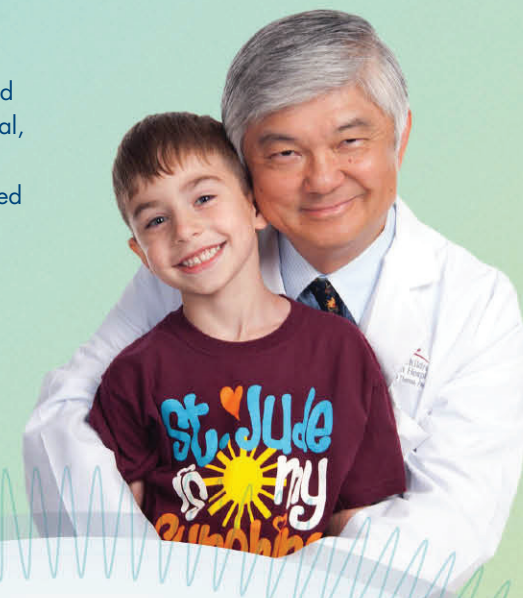
Worldwide Grant Program

These grants are designed to recognize charitable programs or projects that serve children, individuals and families in need within communities around the globe. Worldwide grant award amounts are based on the size and scope of the organization and/or program for which the applicant requests. Regional or local programs typically receive grants up to USD 5,000. National or international programs typically receive grant funding up to USD 25,000.

**"When I give to the MDRT Foundation,
I give back to the world."**

— James V. Durkin, CFP, CLU
26-year MDRT member and Excalibur Knight
Vienna, Virginia, USA

In 2012, the MDRT Foundation partnered with St. Jude Children's Research Hospital, a pediatric medical facility that treats children from around the globe diagnosed with life-threatening illnesses. During the MDRT Annual Meeting in Anaheim, California, USA, the MDRT Foundation awarded a USD 100,000 grant to St. Jude to support its medical treatment and research programs.



Volunteer Community Service Projects

From time to time, the MDRT Foundation coordinates volunteer community service projects in partnership with charities. These volunteer projects allow MDRT members to make a lasting difference in a community. The MDRT Foundation provides a grant to support the charity's mission while organizing a group of MDRT members to serve as volunteers for a community service project. Since 2002, the MDRT Foundation has coordinated service projects to package meals for people affected by malnutrition, and to build playgrounds and homes for underserved communities throughout the world.

Global Gift Fund

Global Gift Fund is a donor-advised service that offers a unique charitable planning tool for clients while providing a money management opportunity for MDRT members. Offered through the Renaissance Charitable Foundation and endorsed by the MDRT Foundation, Global Gift Fund provides an opportunity to create a family foundation similar to a private foundation, but without the administrative hassle. Unlike private foundations, a donor-advised fund is an efficient and inexpensive means of creating a family legacy. Additional information about Global Gift Fund can be found at www.globalgiffund.org.

Additional information and ways to support the life-changing work of the MDRT Foundation can be found at www.mdrtfoundation.org.



MDRT PAST PRESIDENTS

YEAR	TOTAL MEMBERSHIP
1927 *Paul F. Clark, CLU, John Hancock, Boston, Massachusetts	32
Meeting at the Peabody, Memphis, Tennessee	
1928 *William M. Duff, CLU, Equitable – New York, Pittsburgh, Pennsylvania	39
Meeting at the Book-Cadillac, Detroit, Michigan	
1929 *George E. Lackey, CLU, MassMutual, Detroit, Michigan	64
Meeting at the Mayflower, Washington, D.C.	
1930 *Earl G. Manning, John Hancock, Boston, Massachusetts	118
Meeting at the Royal York, Toronto, Ontario, Canada	
1931 *Theodore M. Riehle, CLU, Equitable – New York, New York, New York	168
Meeting at the William Penn, Pittsburgh, Pennsylvania	
1932 *Robert A. Brown, Pacific Mutual, Los Angeles, California	125
Meeting at The Fairmont, San Francisco, California	
1933 *M.J. Donnelly, Equitable – New York, New Castle, Pennsylvania	101
Meeting at The Stevens, Chicago, Illinois	
1934 *Thomas M. Scott, Penn Mutual, Philadelphia, Pennsylvania	118
Meeting at The Schroeder, Milwaukee, Wisconsin	
1935 *Caleb R. Smith, MassMutual, Fort Lauderdale, Florida	124
Meeting at The Savery, Des Moines, Iowa	
1936 *Harry T. Wright, Equitable – New York, Chicago, Illinois	143
Meeting at the Ritz-Carlton, Boston, Massachusetts	
1937 *Grant Taggart, California – Western States, Cowley, Wyoming	158
Meeting at the Brown Palace, Denver, Colorado	
1938 *Jack Lauer, Penn Mutual, Cincinnati, Ohio	162
Meeting at The Rice, Houston, Texas	
1939 *Paul C. Sanborn, Connecticut Mutual, Boston, Massachusetts	163
Meeting at The Jefferson, St. Louis, Missouri	
1940 *Henry G. Mosler, MassMutual, Los Angeles, California	154
Meeting at the Bellevue-Stratford, Philadelphia, Pennsylvania	
1941 *H. Kennedy Nickell, CLU, Connecticut General, Chicago, Illinois	171
Meeting at the Netherland Plaza, Cincinnati, Ohio	
1942 *Robert P. Burroughs, National Life – Vermont, Manchester, New Hampshire	223
No meeting due to war.	
1943 *Ron Stever, CLU, Equitable – New York, Los Angeles, California	232
Meeting at the William Penn, Pittsburgh, Pennsylvania	
1944 *A.J. Ostheimer III, Northwestern Mutual, Honolulu, Hawaii	408
Meeting at The Statler, Detroit, Michigan	
1945 *John E. Clayton, MassMutual, Newark, New Jersey	468
No meeting due to war.	
1946 *Louis Behr, CLU, Equitable – New York, Chicago, Illinois	525
Meeting at French Lick Springs, French Lick, Indiana	
1947 *Harold S. Parsons, The Travelers, Corona Del Mar, California	726
Meeting at the New Ocean House, Swampscott, Massachusetts	

1948 *Paul H. Dunnavan, CLU, Canada Life, Minneapolis, Minnesota	829
Meeting at French Lick Springs, French Lick, Indiana	
1949 *Paul W. Cook, CLU, Mutual Benefit Life, Chicago, Illinois	824
Meeting at the Netherland Plaza, Cincinnati, Ohio	
1950 *Theodore Widing, CLU, Provident Mutual, Philadelphia, Pennsylvania	790
Meeting at Haddon Hall, Atlantic City, New Jersey	
1951 *John O. Todd, CLU, Northwestern Mutual, Evanston, Illinois	949
Meeting at the Hotel Del Coronado, Coronado, California	
1952 *Walter N. Hiller, CLU, Penn Mutual, Chicago, Illinois	1,065
Meeting at the Mount Washington, Bretton Woods, New Hampshire	
1953 *William T. Earls, CLU, Mutual Benefit Life, Cincinnati, Ohio	1,240
Meeting at The Greenbrier, White Sulphur Springs, West Virginia	
1954 *G. Nolan Bearden, New England Life, Atlanta, Georgia	1,492
Meeting at the Hotel Del Coronado, Coronado, California	
1955 *George B. Byrnes, CLU, New England Life, Palos Verdes, California	1,557
Meeting at The Greenbrier, White Sulphur Springs, West Virginia	
1956 *Arthur F. Priebe, CLU, Penn Mutual, Rockford, Illinois	2,013
Meeting on the Kungsholm to Bermuda	
1957 *Howard D. Goldman, CLU, Northwestern Mutual, Richmond, Virginia	2,438
Meeting at The Greenbrier, White Sulphur Springs, West Virginia	
1958 *William D. Davidson, CLU, Equitable – New York, Chicago, Illinois	2,987
Meeting at the Banff Hotel, Banff, Alberta, Canada	
1959 *Adon N. Smith II, CLU, Northwestern Mutual, Charlotte, North Carolina	2,688
Meeting at the Americana, Bal Harbour, Florida	
1960 *Robert S. Albritton, CLU, Provident Mutual, Los Angeles, California	3,040
Meeting at the Hilton Hawaiian Village, Honolulu, Hawaii	
1961 *James B. Irvine Jr., CLU, Northwestern Mutual, Chattanooga, Tennessee	2,932
Meeting at the Americana, Bal Harbour, Florida	
1962 *Lester A. Rosen, CLU, Union Central, Memphis, Tennessee	3,122
Meeting at The Queen Elizabeth, Montreal, Quebec, Canada	
1963 *Daniel H. Coakley, New York Life, Boston, Massachusetts	3,420
Meeting on The Kungsholm to Bermuda	
1964 *Alfred J. Lewallen, CLU, Mutual Benefit Life, Miami, Florida	3,202
Meeting at The Diplomat, Hollywood, Florida	
1965 *Iram H. Brewster, Phoenix Mutual, Pittsburgh, Pennsylvania	3,636
Meeting at The Broadmoor, Colorado Springs, Colorado	
1966 *Donald Shepherd, John Hancock, Boston, Massachusetts	4,076
Meeting at the Statler Hilton, Boston, Massachusetts	
1967 *Frank E. Sullivan, CLU, Mutual Benefit Life, Newark, New Jersey	4,616
Meeting at Congress Hall, Lucerne, Switzerland	
1968 *Sadler Hayes, Penn Mutual, New York, New York	5,078
Meeting at the Masonic Memorial Temple, San Francisco, California	
1969 *Stanley S. Watts, CLU, Equitable – New York, Miami, Florida	5,689
Meeting at The Diplomat, Hollywood, Florida	
1970 *John H. Ames, CLU, Mutual Benefit Life, Morristown, New Jersey	6,675
Meeting at the Hilton Hawaiian Village, Honolulu, Hawaii	

*DECEASED

MDRT PAST PRESIDENTS (CONTINUED)

YEAR	TOTAL MEMBERSHIP
1971	Richard G. Bowers, CLU, New York Life, Keokuk, Iowa 7,589 Meeting at The Washington Hilton, Washington, D.C.
1972	*James B. Longley, CLU, New England Life, Lewiston, Maine 8,361 Meeting at The Queen Elizabeth, Montreal, Quebec, Canada
1973	Henry F. McCamish Jr., CLU, MassMutual, Atlanta, Georgia 9,587 Meeting at The Seattle Center, Seattle, Washington
1974	*C. Robinson Fish III, CLU, Northwestern Mutual, Boston, Massachusetts ... 10,987 Meeting at the Fountainebleau, Miami Beach, Florida
1975	Jack Peckinpugh, CLU, ChFC, Indianapolis Life, Muncie, Indiana 12,422 Meeting at the Masonic Memorial Temple, San Francisco, California
1976	*Rulon E. Rasmussen, CLU, New York Life, Phoenix, Arizona 11,804 Meeting at The Hynes Auditorium, Boston, Massachusetts
1977	*Marshall I. Wolper, CLU, Equitable – New York, Miami, Florida 12,757 Meeting at the Atlanta Civic Center, Atlanta, Georgia
1978	*Jack L. McKewen, CLU, Fidelity Mutual, Birmingham, Alabama 14,742 Meeting at the Blaisdell Center, Honolulu, Hawaii
1979	*Paul L. Oliver Jr., CLU, Prudential of America, San Francisco, California ... 17,205 Meeting at McCormick Place, Chicago, Illinois
1980	Millard J. Graver, CLU, Equitable – New York, Chicago, Illinois 17,406 Meeting at The Rivergate, New Orleans, Louisiana
1981	Clune J. Walsh Jr., CLU, Home Life, Detroit, Michigan 17,581 Meeting at Radio City Music Hall, New York, New York
1982	*Stanley Liss, CLU, New York Life, New York, New York 17,737 Meeting at the Atlanta Civic Center, Atlanta, Georgia
1983	Jack B. Turner, CLU, ChFC, General American Life, Clarksville, Tennessee.....17,679 Meeting at the Dallas Convention Center, Dallas, Texas
1984	Paul R. Buckley, CLU, New England Life, Lewiston, Maine 18,964 Meeting at Radio City Music Hall, New York, New York
1985	Ron D. Barbaro, North American Life, Toronto, Ontario, Canada 21,722 Meeting at the San Francisco Civic Auditorium, San Francisco, California
1986	*Frank Friedler Jr., CLU, Home Life, New Orleans, Louisiana 20,598 Meeting at the Orange County Convention/Civic Center, Orlando, Florida
1987	Wilmer S. Poynor III, CLU, ChFC, New York Life, Birmingham, Alabama 17,051 Meeting at McCormick Place, Chicago, Illinois
1988	Arlen I. Prentice, CLU, ChFC, Seattle, Washington 16,944 Meeting at the Atlanta Civic Center, Atlanta, Georgia
1989	G. Carey Hauenstein, CLU, State Mutual of America, Laurel, Mississippi 16,792 Meeting at the Metro Toronto Convention Centre, Toronto, Ontario, Canada
1990	*David H. Hilton, CLU, ChFC, Northwestern Mutual Life, Chicago, Illinois 16,393 Meeting at the San Francisco Civic Auditorium, San Francisco, California
1991	Seymour Petrovsky, CLU, Business Men's Assurance, Phoenix, Arizona 16,297 Meeting at the New Orleans Convention Center, New Orleans, Louisiana

1992	William T. O'Donnell, MassMutual, Chicago, Illinois 15,957 Meeting at McCormick Place, Chicago, Illinois
1993	Charles D. Marks, CLU, ChFC, Prudential of America, New Orleans, Louisiana 15,721 Meeting at the Hynes Convention Center, Boston, Massachusetts
1994	Lyle L. Blessman, Northwestern Mutual, Englewood, Colorado 15,686 Meeting at the Dallas Convention Center, Dallas, Texas
1995	Robert B. Plybon, CLU, ChFC, Phoenix Home Life, Greensboro, North Carolina 15,703 Meeting at the Metro Toronto Convention Centre, Toronto, Ontario, Canada
1996	Walter G. Schnee III, Phoenix Home Life, Pasadena, California..... 18,784 Meeting at the Anaheim Convention Center, Anaheim, California
1997	John W. Cruikshank III, CLU, Northwestern Mutual, Deerfield, Illinois 18,815 Meeting at the Atlanta Civic Center, Atlanta, Georgia
1998	Gene L. Mahn, CLU, ChFC, MassMutual, Thousand Oaks, California..... 19,182 Meeting at McCormick Place, Chicago, Illinois
1999	Reginald N. Rabjohns, CLU, ChFC, New England Financial, Chicago, Illinois 21,262 Meeting at Ernest N. Morial Convention Center, New Orleans, Louisiana
2000	Brian H. Ashe, CLU, Independent, Lisle, Illinois 23,341 Meeting at Bill Graham Civic Auditorium, San Francisco, California
2001	Tony Gordon, Independent, Bristol, England, United Kingdom 25,037 Meeting at Metro Toronto Convention Centre, Toronto, Canada
2002	Marvin H. Feldman, CLU, ChFC, New York Life, East Liverpool, Ohio 28,282 Meeting at Gaylord Opryland Resort and Convention Center, Nashville, Tennessee
2003	Richard H. Sullenger, GenAmerica Financial, Bakersfield, California..... 27,665 Meeting at Paris and Bally's Hotel and Casino, Las Vegas, Nevada
2004	George B. Pickett, J.D., CLU, Valmark Securities, Jackson, Mississippi 29,652 Meeting at the Anaheim Convention Center, Anaheim, California
2005	Adelia C. Chung, CLU, ChFC, Chung Insurance and Investment Group, Honolulu, Hawaii 33,297 Meeting at the Ernest N. Morial Convention Center, New Orleans, Louisiana
2006	Stephen O. Rothschild, CLU, ChFC, Rothschild & Sale, St. Louis, Missouri 35,781 Meeting at the San Diego Convention Center, San Diego, California
2007	Philip E. Harriman, CLU, ChFC, Lebel and Harriman, Falmouth, Maine..... 35,662 Meeting at the Colorado Convention Center, Denver, Colorado
2008	James E. Rogers, CLU, CFP, Rogers Group Financial, Vancouver, British Columbia, Canada 39,340 Meeting at the Toronto Convention Centre, Toronto, Ontario, Canada
2009	Walton W. Rogers, CLU, ChFC, W. Rogers and Associates, Annapolis, Maryland 31,857 Meeting at Indiana Convention Center, Indianapolis, Indiana
2010	Guy Baker, MSFS, CLU, BMI Consulting Irvine, California 31,142 Meeting at Vancouver Convention Center, Vancouver, British Columbia, Canada
2011	Julian H. Good, CLU, ChFC, MetLife Creative Financial Solutions New Orleans, Louisiana 35,908 Meeting at Georgia World Congress Center, Atlanta, Georgia

*DECEASED

STAFF & DEPARTMENTS

MDRT headquarters in Park Ridge, Illinois, USA, is home to approximately 70 professionals in nine different departments. Following is a list of Executive staff:

Chief Executive Officer	Stephen P. Stahr, CAE
Marketing and Communications Director	Pamela K. Brown, CMP, CAE
Global Markets Director	Eryn Carter, CAE
MDRT Foundation Executive Director	India Alexis Ehioba, MNA, CFRE
Membership and International Services Director	Thomas S. Ensign
Human Resources Director	Laura E. Good, PHR
Meeting Services Director	Raymond Kopcinski, CMP
Finance Director	Laura McGrady, CPA
Emerging Media Director	Wayne Schmeiser

MDRT Recruitment Efforts

At www.joinmdrt.org, prospective members can learn more about the organization and download selected member-exclusive resources, such as a copy of *Round the Table* magazine, podcasts and the Annual Meeting "Proceedings."

CONTACT INFORMATION

To learn more about MDRT, or to interview a member of MDRT's Executive Committee or an MDRT member, please contact Don Noverini or Jennifer Schimka in MDRT's Marketing and Communications Department at +1 847.692.6378.

For additional information on MDRT, visit www.mdrtd.org. Additional information about the MDRT Foundation and ways to contribute can be found at www.mdrtdfoundation.org. For information about becoming an MDRT member, go to www.joinmdrt.org.

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