

2018 Uear in Review

It was a year of initiatives, a meeting's debut, recordbreaking fundraising and a running calendar of events.

Under CEO leadership, we reached bold new heights: the innovative launch of the MDRT App, the first anniversary milestone for the MDRT Academy and a record 10,000 followers on Twitter and Instagram.

The EDGE Meeting debuted to member acclaim, and we saluted the outgoing Experience Meeting as it made way for the Global Conference in 2019. All while surpassing the "100" mark — 104, to be exact — as our MDRT team grew to serve members better. Speaking of a growing team, an in-the-works initiative is parlaying focus group feedback into an even better onboarding experience for future hires.

A full event schedule tapped MDRT Core Values — Teamwork, Fun and Health and Wellness, for starters and even inspired departments to create and host a couple of their own. Our parking lot saw much more than cars this summer, as food trucks set up shop and Picnic on the Pavement creatively paired team-building with fun. With Art Therapy's popularity, we expanded to two sessions this year, highlighting a full schedule of Health Week wellness offerings. Pumpkin-carving grew from an individual effort to a department team challenge. "Take Twos" at each holiday and Summer Fun bonus days were more-than-appreciated additions.

We recognized peers with Good Apple awards, a trophy that traveled, "a pop on me" and millions of thanks. Spotlights on staff now feature departments, too. We celebrated career milestones of 25, 30 and even 35 years and congratulated co-workers who chose to retire this year. There were family milestones, as well, as one in particular welcomed a new addition.

From Jeans Mondays to Jeans Weeks... Through the generosity of staff, the MDRT Foundation and MDRT, quarterly jeans-themed fundraisers reached record levels of giving not seen since the program began in 2012. MDRT Gives Day, a global day of giving coordinated by the MDRT Foundation and back for its second year, topped last year's levels. A Thanksgiving food drive and December book drive are benefiting the community at holiday time.

All in all, not a bad way to fill the past 12 months. So, in celebration, we offer this retrospective take on a fun, collaborative and most meaningful year.

Another year of giving, from the local community to the world stage

The generosity of MDRT staff was front-and-center once again with "MDRT Gives Day," the Thanksgiving food drive, holiday book drive and a series of successively record-breaking Jeans Week fundraisers.



Second annual **"MDRT Gives Day"** was one for the books

It was on a worldwide scale. The MDRT- and MDRT Foundationsponsored "*MDRT Gives Day*" on October 23 edged out last year's inaugural event by more than USD 12,000, collectively generating more than USD 156,000 from 880 donors representing 37 countries.

Led by Donor Relations Coordinator **Caryn Henning**, the one-day, online fundraising event united the MDRT community and

financial services industry in supporting the MDRT Foundation's global grant programs. MDRT staff participated in a specially timed Jeans Day, with \$5 donations matched by MDRT and the MDRT Foundation.

Thanksgiving food drive

It didn't stop there. Food drive donations collected between October 29 and November 16 benefited Park Ridge-based Avenues of Independence, which provides homes, jobs and community living programs for Chicago-area adults with physical, intellectual and developmental disabilities. MDRT has a multiyear partnership with the charitable organization.

Human Resources Generalist Naadia Chaudhry, Membership and External Relations Strategist Jennifer Chen, Round the Table Editor Liz DeCarlo, Web Content Coordinator Adam Espino, Member Relations Manager Kristin



Brittany Wright jumps right in to the food drive effort while sorting donations.

Mikrut and Digital Media Strategist **Brittany Wright** spearheaded collections and coordinated the November 20 delivery to Avenues for Independence. Winners of weekly raffles for food drive donors were IT Support Analyst **Sue Felix**, Executive Assistant **Gina Fadin** and Program Assistant **Valerie Fontanetta**. All took home \$10 gift cards from Potbelly Sandwich Works, Starbucks or Amazon.

And then there were Jeans Weeks...

As part of the quarterly, week-long fundraisers, staff donated \$5 per day each day they opted to wear jeans to work. MDRT and the MDRT Foundation matched all 501(c)(3) donations. Each charity had special meaning for the employee who recommended it.

At the time of this writing (which excludes MDRT's fourth and final fundraiser of the year beginning December 17), 2018 Jeans Weeks have generated \$13,920 -- \$4,640 from direct staff contributions and matching donations from MDRT and the MDRT Foundation. Third quarter 2018 generated a record-breaking **\$5,160** in contributions -- MDRT's highest since the program began in late-2012.



Love INC works with churches to help families in need with donated furniture, household items, clothing, financial counseling and household repairs. Suggested by Production Coordinator Jeff Jones as the first Jeans Week beneficiary of 2018, the fundraiser generated \$4,035, including \$1,345 from staff contributions.



CHICAGO METROPOLITAN BATTERED WOMEN'S NETWORK September 17-21

Thanks to MDRT Foundation Executive Director Michele Stauff, Chicago Metropolitan Battered Women's Network was the beneficiary of a *record \$5,160* (\$1,720 from staff, with matching contributions from MDRT and the Foundation) -- the largest total since MDRT's Jeans Week program began. CMBWN is dedicated to improving the lives of those impacted by domestic violence through education, public policy and advocacy and connecting community members to direct service providers.





Endorsed by Donor Relations Coordinator Caryn Henning, Fraxa Research Foundation funds research grants and fellowships to find effective treatments and ultimately a cure for Fragile X syndrome, a genetic condition that causes intellectual disability and behavioral and learning challenges, to help people affected by autism, Alzheimer's and other brain disorders. The week generated \$4,725, including \$1,575 from staff contributions.



Camp One Step provides empowering, supportive, educational and fun experiences for children, aged 5-19, who have been diagnosed with cancer. They are the only local organization to offer 11 different programs throughout the year serving children and families who live in Illinois, Wisconsin and throughout the Midwest. Program Assistant **Sue Armanetti** proposed the charity when her son, a childhood cancer survivor, ran in support for them in the 2016 Chicago Marathon. *Watch for results...*

Nineteen in '18: MDRT welcomed the Class of 2018



Eddy Mirko Content Development Global Markets January 2



Erica Goldberg January 17



Lauren Bugielski **Global Markets** March 12



Elizabeth Diffin Content Development March 12





Barbara O'Connor Executive March 19



Valerie Fontanetta Professional Development March 26



Michael Gutierrez Meeting Services March 28



Andrea Litewski Professional Development April 2



Don Wood **Emerging Media** April 30



Phyllis Coneset, CMP Meeting Services May 9



Taylor Conrad Marketing and Communications



Nikki Novak Professional Development September 18



Joanne Jensen **Meeting Services** October 29



Giang Ngo Marketing and Communications May 30



Norah Webster, CMP Professional Development November 14



Mehvi Akbar Human Resources June 11



Michelle Sweeney Professional Development December 3



Rebecca Lea Moyer Marketing and Communications August 30



Julie Langlie, CMP **Meeting Services** December 4

Showcasing 2018 Good Apple honorees



Celebrating colleagues who exemplify MDRT's Core Values:

Wayne Schmeiser and Adam Espino - April 26 (Innovation and Teamwork) Tammy Chan - August 21 (Excellence and Teamwork) Lena Bykhovsky and Lena Polishuk - August 28 (Excellence, Teamwork, Innovation) Matt Pais - September 5 (Excellence, Integrity, Health and Wellness) Tammy Chan - September 20 (Teamwork and Excellence) Gayle Weinhouse - October 2 (Teamwork and Excellence) Mike Krilich - October 24 (Teamwork) Molly Kaz - December 10 (Teamwork and Fun) Mehvi Akbar - December 20 (Teamwork) Naadia Chaudhry, Tammy Chan, Vic Bianchini, Austin Hurley - December 27 (Teamwork and Excellence)

...and Traveling Trophy recipients

True to MDRT tradition, staffers circulated the trophy throughout MDRT headquarters to celebrate and thank colleagues for going beyond expectations. Each, in turn, signed the attached ribbon and became part of MDRT history. Monthly award recipients are featured on the ATM home page:



Luann Burchfield



Naadia Chaudhry, Laura Good January 5



Katie Keuneke February 28



Jeff Jones March 28



Pam Brown September 6





Erica Goldberg August 3



Barb Schell July 5

Mike Bonifert October 10





Kris Flaga November 12



Roseann Casilio December 11

Images... MDRT's 2018 meetings

MDRT Experience and Global Conference - February 8 to 10, Bangkok, Thailand

The MDRT planning and onsite team celebrated the last Experience and Global Conference before upcoming changes in 2019.



The onsite team gathers at the Bangkok International Trade & Exhibition Centre for this official photo. **From left:** Mofya Kabwe, Austin Hurley, Anne Dignan, Shawn Boothe, Jess Jurasz, Barb Schell, Jeanne Malone, Karen Matts, Eryn Carter, Shalini D'Souza and MCI representative Chris Ng.

MDRT Annual Meeting - June 24 to 27, Los Angeles



Steve Faulhaber (left), Luann Burchfield, Molly Kaz and Austin Hurley help manage set-up as the Annual Meeting gets underway.

Livestreaming of Main Stage and other meeting programming brought the meeting back to staff at MDRT headquarters in real time.

And, while in L.A...

Naadia Chaudhry (below, left) and Kristin Mikrut capitalized on this rare photo opportunity at a local bookstore during some downtime during the 2018 Annual Meeting in Los Angeles. Kristin spearheads MDRT's "NOBC" (Not Oprah's Book Club) every other month at Moretti's in Edison Park.



...and in appreciation:

The MDRT Annual Meeting Launch team celebrated Program Manager **Barb Schell's** long-time service as their MDRT staff partner.



Above: Marking Barb Schell's (front row, second from right) last MDRT Annual Meeting, the Launch Team thanked Barb for her long-time service. **Right:** Barb, with her gift of appreciation from the Launch Team. (Photos: Luann Burchfield).



Top of the Table Annual Meeting - October 3 to 6, 2018, Kauai, Hawaii

CEO Steve Stahr (left) joins the onsite support team at the Top of the Table Annual Meeting in Kauai, Hawaii. **Front row, from left:** Karen Matts, Brittany Wright, Molly Kaz, Shawn Boothe, Nikki Novak and Liz DeCarlo. **Back row:** Michele Stauff, Jess Jurasz, Barbara O'Connor, Phyllis Coneset, Jeanne Malone and Mike Gutierrez.

MDRT EDGE Meeting - November 7 to 9, Boston

Media Relations Coordinator Giang Ngo (right) helps a member and EDGE Meeting attendee

<text>



Meetings Assistant Molly Kaz (photo, left) hustles to check in EDGE Meeting arrivals.

An appreciation dinner acknowledged the U.S. Growth Team's significant contributions and volunteer hours on behalf of MDRT.



third from left, with wife Kathy seated to his right) and Second Vice President **Ian James Green**, **Dip PFS** (front row, right), both liaisons to the Member Communications Committee. CEO **Steve Stahr, CAE**, and Managing Director **Barbara O'Connor** (both back row), Membership and External Relations Strategist **Lena Polishuk** (back row, center) and Business Development Manager **Mary Lake** (front row, left) represented staff.

Summer 2018:

Austin Hurley (left) and Steve Faulhaber

Summer fun: "Work Hard/Play Hard"

CEO **Steve Stahr** unveiled "Work Hard/Play Hard" perks at the July 10 All Staff meeting to celebrate the successful Annual Meeting, June 24 to 27, in Los Angeles. Extras included food trucks, Flip-Flop Fridays and additional "Take Twos," as well as bonus days with gasoline gift cards and extra cash to enjoy the days off. MDRT staffers shared their experiences on "Yammer."



Food trucks, more food trucks and Picnic on the Pavement

Tast

Caryn Henning (above, right)

claims her order.

The MDRT parking lot boasted a lot more than cars this summer.

Food truck #1: CheSa's Taco Truck -- July 10

MDRT's first food truck of 2018 marked the official launch of the summer season, as staff queued up for the made-to-order menu:



Above: Tim Sieck (foreground) and Yuna Kim

Marianne Thvedt.

Food truck #2: "The Slide Ride" - July 23

Taking full advantage of perfect weather and the company of co-workers, staffers enjoyed the second of four food trucks this summer.





Brittany Sydor (left) and Jenni Witkov

Sara Estrella (left) and Yuna Kim



From left: Shalini D'Souza, Phyllis Coneset, Terri Armstrong, Tammy Johnson-Peón, Joanne Consiglio, Laura McGrady, Anne Dignan, Luann Burchfield and Jeanne Malone



Steve Faulhaber (right)



Emily Diana (left), Taylor Conrad, Don Noverini and Wayne Schmeiser

Food truck #3: Beavers Coffee + Donuts - August 10

A perennial favorite and MDRT's third food truck of 2018, Beavers Coffee + Donuts greeted staffers with early-morning, pick-your-own-topping mini-donuts and coffee.





Valerie Fontanetta (left) and Andrea Litewski

Food truck #4: Pink Taco Truck - September 10



Griselda Verdin and Tammy Chan

Shalini D'Souza and Mary Lake









Tim Sieck, Mike DePilla and Matt Pais



HICAGO.PINKTACO.

Maureen Gallagher, Terri Armstrong and Kristin Mikrut



Lena Bykhovsky and Lena Polishuk

...and a year-long lineup of holidays and celebrations

Cubs, Sox home openers - April 5

Staffers kicked off baseball's 2018 season with a lunch-time nod to Chicago's dual home openers.





Hard Core T-Shirt Day - May 31

T-shirts, punctuated by a catered lunch, framed the day's "hard core" theme. The black-and-white shirts, which reinforce MDRT's commitment to the Core Values, made their debut when our Core Values were originally adopted in May 2012.



In support of the 2018 Annual Meeting...

Ship Day - June 14

Shrink-wrapped pallets loaded with books, supplies and MDRT Store merchandise took over the staging area just outside Building Services in preparation for shipment to Los Angeles.



Annual Meeting T-Shirt Day - June 22

And, for those who kept business rolling at MDRT headquarters while the Annual Meeting team was in Los Angeles...



Sporting the same T-shirts worn by their on-site counterparts, staff remaining in Park Ridge showed solidarity with the team en route to, or already setting up in, the Los Angeles Convention Center ahead of the 2018 Annual Meeting.

Health Week 2018 - July 30 to August 3

Week-long offerings ranged from well-being assessments and

ways to de-stress to a walking challenge, snack stations, chair massages and more...



And "Glitter Pallet" art therapy

A perennial favorite and prompted by high demand, MDRT's planning team offered *two* **Art Therapy "Glitter Pallet"** creative sessions, among the most popular offerings of Health Week 2018.





Initiatives and achievements...

MDRT Member App launch - August 10



Capping months of nurturing the initiative to fruition, the launch of MDRT's new member app framed the day's events, in every sense of the word, with *app*-etizers and cake, while staffers learned about the new member benefit.





Katie Keuneke and Don Noverini MDRT The Premier Association of Financial Professionals



Terri Rybka (left) and Shawn Boothe

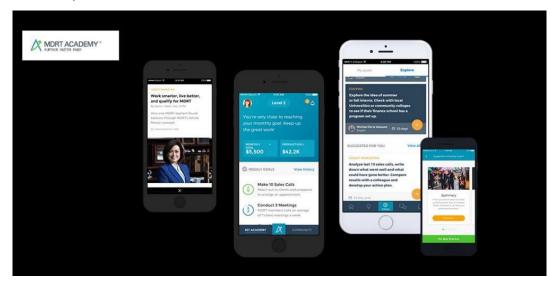
Allie Kleinhans and Emily Diana

Taylor Conrad

The MDRT Academy marked its first anniversary milestone

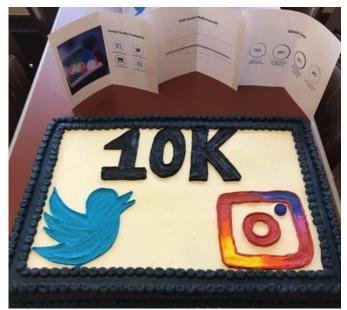
November 2018 reached the one-year anniversary of the launch of the MDRT Academy. Participation climbed steadily throughout the Academy's first year, thanks to a multi-faceted marketing campaign to promote membership; efforts to keep members engaged with new resources each week; and an enhanced version of the app each quarter.

The team, led by MDRT Academy Manager **Tammy Johnson-Peón**, is preparing for a pilot with U.S. companies in 2019.



While MDRT scored another breakthrough: 10,000 followers on social media!

There was yet another milestone in 2018, as MDRT reached a record 10,000 followers on Twitter and Instagram. The Marketing and Communications department quarterbacked celebration of the achievement with a sweet way to share the news.



Picnic on the Pavement - August 17

Once again, the MDRT parking lot was transformed into a picnic venue, with Bingo and prizes, team-building challenges, glass painting and a picnic lunch.





Wright (left), Adam Espino, Kristin Mikrut, Liz DeCarlo and Naadia Chaudhry



Matt Pais (left), Michael Gutierrez, Jeff Jones and Steve Faulhaber



Elizabeth Diffin analyzes the stack before carefully removing the next block







Kathy Angelini (left) strategizes with her team.

Staff took full advantage of the dunk tank challenge, photo booth and glass painting.





Steve Stahr (above, right) takes aim during Rob Mikrut's turn in the dunk tank, while Adam Espino (photo at left) waits for the next challenger.





Above, from left: Jean Gibellin, Joanne Consiglio, Charmaine Recendez and Tammy Chan

Katy Przybytek (left), Andrea Litewski and Jess Jurasz



We think this is Gina Fadin.



Department events

Building Services Pretzel Day - October 11

The event's namesake team played host to a pretzeland-root beer open house to showcase their newly completed first-floor space.



Photo, above right: The Building Services team at Director Austin Hurley's 30th MDRT Anniversary, November 2014, shown through the lens of a "Sketch Photo" app. With Austin (center) are Steve Faulhaber (left) and Rob Mikrut.

Hosts and guests alike queue up at the condiment bar.



Roseann Casilio (above left), Suzanne Henn and Traci LoBello



Kathy Angelini (left) samples a just-made pretzel, while Taylor Conrad and Emily Diana move on to beverages.





Taylor Conrad (left), Emily Diana and Jenni Witkov join Austin



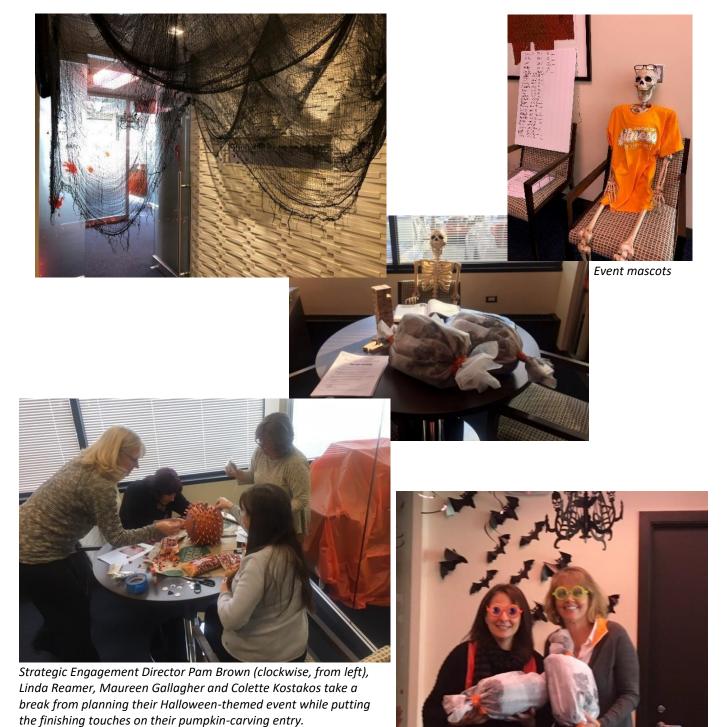
Gathering at the root beer bar – Marianne Thvedt (left), Mofya Kabwe, Rebecca Moyer, Sue Felix and Shawn Boothe



Vic Bianchini, Mike Bonifert and Don Wood

Halloween, "Strategic Engagement"-style! - October 31

The Strategic Engagement team created this memorable "Not your Mummy's Scavenger Hunt" and "Mysteries of Witches Row" trivia challenge that tested staff knowledge of some obscure and some not-so-obscure MDRT historical tidbits.



Gina Fadin (left) and Terri Armstrong tied for first place in the *"Mysteries of Witches Row"* MDRT trivia challenge.

Halloween 2018 - October 31

Organized by MDRT's Party Squad - Mehvi Akbar, Steve Faulhaber, Molly Kaz, Rebecca Moyer and Katy Przybytek - Halloween 2018 was an absolute hit, all the way around:

Department Pumpkin-Carving Contest - October 30-31

New this year was a team approach. Department creativity let loose during this first-ever team-based Halloween competition. Professional Development, Marketing and



Communications and Information Technology captured first, second and third place, respectively:



2st Prize: Marketing and Communications





Anniversaries, retirements and family celebrations

Tom Ensign's 25th anniversary - January 25

His colleagues roasted Tom with stories and recollections marking his 25 years at MDRT.



Shawn Boothe's 25th anniversary - July 19

A video retrospective, colleague recollections and stories were the centerpiece of the celebration showcasing Shawn's 25-year mark at MDRT.



Jo Rizzuto's 35th anniversary celebration - August 7

Jo didn't need to tell us that this 35th MDRT Anniversary event truly was a surprise. Stories, tributes, her favorite beach memorabilia and Portillo's cuisine marked her anniversary milestone.



Pam Brown's 30th anniversary celebration - December 6

The surprise event marked Pam's 30-year MDRT career milestone. Colleagues previously roasted by Pam at *their* anniversary celebrations turned the tables with their own shared stories.



Debra Martin's retirement - July 20

Debra's colleagues shared stories and celebrated her MDRT career at the Global Marketshosted event.



Barb Schell's retirement - December 21



Program Manager **Barb Schell** retires from MDRT after 13 1/2 years of service. Barb, who has held assignments in Meeting Services and, most recently, the Professional Development department, has served as liaison to the Annual Meeting Program Development Division, with responsibility for program development and implementation for the Annual Meeting. (December 17 retirement celebration photos available soon!)

Lena Bykhovsky's baby shower - September 12

The surprise event for Lena featured gifts, good wishes and a baby-blue-themed cake.









"Worksgiving" 2018 - November 16

Staffers got a head start on the Thanksgiving holiday with this "Worksgiving" potluck lunch, compliments of the MDRT Party Squad -- Mehvi Akbar, Steve Faulhaber, Molly Kaz, Rebecca Moyer and Katy Przybytek.

The first-time event evolved from a Party Squad idea to host a Thanksgiving gathering as MDRT's newly debuted EDGE Meeting came to a close November 9. Blending work and Thanksgiving, the event, which was both fun and inclusive, merged *two* MDRT Core Values.



The impromptu potluck lunch showed promise as a new annual event. Front row: Mehvi Akbar (left), Katy Przybytek and Lauren Bugielski. Back row: Suzanne Henn, Gina Fadin, Naadio Chaudhry, Valerie Fontanetta, Norah Webster, Mary Lake and Lena Polishuk.



Lauren Bugielski (clockwise from front, left), Lena Polishuk, Suzanne Henn, Gina Fadin and Naadia Chaudhry

Below: Norah Webster, Valerie Fontanetta, Mary Lake and Katy Przybytek



Year-end highlights:

Decking the halls (and the lobby) - November 21

MDRT's newest hires readied the MDRT lobby for the holiday season, and had a little fun in the process...

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O&A with the Executive Committee - December 5

The December tradition continued. MDRT's Executive Committee hosted its annual All Staff Breakfast question-and-answer event at the Westin O'Hare in Rosemont, Illinois.

The golf-themed breakfast featured networking with peers, team photos and



a chance to talk one-on-one with the 2018-2019 Executive Committee --President Ross Vanderwolf, CFP; Immediate Past President James D. Pittman, CLU, CFP; First Vice President Regina

Bedoya, CLU, ChFC; Second Vice President lan James Green, Dip PFS; and Secretary Randy L. Scritchfield, CFP, LUTCF.

Following breakfast, the Executive Committee fielded staff questions during a lively Q&A moderated by CEO Steve Stahr, CAE. The golf theme with the Australian twist was a nod to Executive Committee President Ross Vanderwolf.



ExCom and friends. Flanking Executive Committee President Ross Vanderwolf, CFP, are (from left): Managing Director Barbara O'Connor, Second Vice President Ian Green, Dip PFS; First Vice President Regina Bedoya, CLU, ChFC; CEO Steve Stahr, CAE; Immediate Past President Jim Pittman, CLU, CFP; and incoming Secretary Randy Scritchfield, CFP, LUTCF.



Meeting Services



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Information Technology and Emerging Media

Strategic Engagement



Member Processing and Research

Global Markets

Finance



Human Resources, Member Relations and Building Services

MDRT Foundation



Content Development



Marketing and Communications

Winners of a post-event raffle took home breakfast meeting mascots:

Clockwise, from left: Krystal Montiel, Shalini D'Souza, Joanne Consiglio, Gina Fadin and Jeff Jones







Annual Holiday Luncheon - December 14 and holiday book drive 30 The Sugar Factory in Rosemont, Illinois, sets the stage for MDRT's end-of-year "Holiday Cheer." A holiday book drive targeting the kids' Amazon wish list, along with collections of creative and school supplies, will benefit children in Kindergarten through 12th grade. Proceeds from event's holiday raffle from staff contributions, matched by MDRT and the MDRT Foundation, will benefit *Center of Concern*, MDRT YULE TIME EVENT whose programs inform, advocate and intervene on behalf of residents struggling with challenges SUGAR FACTORY 5445 PARK PL related to aging, homelessness and accessing ROSEMONT, IL 60018 resources to remain independent in their homes. (Complete photos are available on the ATM's 11:00 A.M - 3:00 P.M Events page!) The 2018 Holiday Luncheon MDRT HOLIDAY BOOK DRIVE *Committee*: Naadia Chaudhry, Jennifer Chen, Liz DeCarlo, Adam Espino, Kristin Mikrut and Brittany Wright. 826CHI is a non-profit creative writing, tutoring, and publishing center dedicated to amplifying the voices of Chicago youth. Any donation will be appreciated Holidoy Luncheon Committee Liz DeCorle,







Content and layout: Gayle Weinhouse Photos: Naadia Chaudhry (with contributions from Luann Burchfield, Mehvi Akbar and GW) For those who are not featured in this "2018 Year in Review," our apologies.

The online version of this retrospective, which has room to grow, has found a home on the ATM.

December 2018