



MDRT®

2020 Committee Assignments



MDRT

The Premier Association
of Financial Professionals®

BYLAWS AND ETHICS COMMITTEE
MEMBERSHIP DIVISION

OBJECTIVE

Supervise and monitor qualifications of MDRT applicants when ethics issues arise. Establish the eligibility of applicants and members to MDRT in accordance with the Code of Ethics as outlined in the MDRT Constitution and Bylaws. If needed, recommend and draft amendments to the Constitution and Bylaws for presentation to the membership as directed by the Executive Committee.

SPECIFIC ASSIGNMENTS

1. Pre-Meeting Assignment: You are encouraged to submit a unique client strategy, marketing idea or practice management technique that you have used in your practice to improve productivity. Submit to <http://www.imdrt.org/ideas/> MDRT suggests that committees spend time during the committee dinner and meeting sharing submissions.
2. Reinforce membership awareness of the importance of positive ethical behaviors through articles on *Round the Table*, the website or other industry publications.
3. Review all inquiries related to ethical charges and complaints. Submit all recommendations for denial to the Executive Committee for final action.
4. Evaluate recommendations by other MDRT committees that would have impact on the constitution and bylaws.

MEMBERSHIP

This committee shall consist of a chair and diverse/global membership.

COMMITTEE LEADERS AND STAFF

Committee Chair:	John R. Benton Jr., CLTC
Global Council Member	John F. Nichols, MSM, CLU
Executive Committee Liaison:	Randy L. Scritchfield, CFP, LUTCF
Staff Liaisons:	Naadia Chaudhry, Jenny Fisher, Laurie Romanazzi and Tom Ensign



MDRT

The Premier Association
of Financial Professionals®

**LEADERSHIP AND VOLUNTEER
DEVELOPMENT COMMITTEE
MEMBERSHIP DIVISION**

OBJECTIVE

Recommend candidates for various leadership positions, based upon criteria in accordance with the MDRT *Policy Guide*.

SPECIFIC ASSIGNMENTS

1. Identify member leaders to serve as MDRT Global Council Members for identified divisions and submit that list to the Executive Committee.
2. Identify member leaders to serve as Divisional Vice Presidents for identified divisions and submit that list to the Executive Committee.
3. Identify member leaders to serve as Committee Chairs and submit a list of recommendations to the Executive Committee.
4. Identify member leaders to serve as Region and Zone Chairs and submit a list of recommendations to the Executive Committee.
5. You are encouraged to submit a unique client strategy, marketing idea or practice management technique that you have used in your practice to improve productivity. Submit to <http://www.imdrt.org/ideas/>. MDRT suggests that committees spend time during the committee dinner and meeting sharing submissions.

MEMBERSHIP

This committee shall consist of a Chair and experienced membership.

COMMITTEE LEADERS AND STAFF

Committee Chair:	Masahiro Hashimoto, TLC, AFP
Executive Committee Liaison:	Randy Scritchfield, CFP, LUTCF
Global Council Member:	John F. Nichols, MSM, CLU
Staff Liaisons:	Pamela Brown, CAE, CMP, Wanda Dixon, Colette Kostakos



MDRT

The Premier Association
of Financial Professionals®

MEMBERSHIP COMMITTEE

MEMBERSHIP DIVISION

OBJECTIVE

Supervise and monitor qualifications of applicants for membership in the Million Dollar Round Table. In addition, the committee is also responsible for the control and use of MDRT Insignia, the copyrighted marks, the Membership Directory, and all forms of publicity and advertising.

SPECIFIC ASSIGNMENTS

1. Pre-Meeting Assignment: You are encouraged to submit a unique client strategy, marketing idea or practice management technique that you have used in your practice to improve productivity. Submit to <http://www.imdrt.org/ideas/>. MDRT suggests that committees spend time during the committee dinner and meeting sharing submissions.
2. Appraise and rule on all questions pertaining to membership in accordance with the bylaws, MDRT policy and procedures. Review and respond in a time-sensitive manner to all membership cases.
3. Review the auditing procedure of the income qualification method and the online application — refine if necessary.
4. Seek all information necessary to maintain challenging standards for all current and potential MDRT members.

MEMBERSHIP

This committee shall consist of a chair and diverse/global membership.

COMMITTEE LEADERS AND STAFF

Committee Chair: Kelly Herring, CLU, ChFC
Executive Committee Liaison: Randy L. Scritchfield, CFP, LUTCF
Global Council Member: John F. Nichols, MSM, CLU
Staff Liaisons: Kathy Angelini, Joanne Consiglio, Tom Ensign and Tim Sieck



MDRT

The Premier Association
of Financial Professionals®

ANNUAL MEETING PROGRAM DEVELOPMENT COMMITTEES

ConneXion Zone Program

Focus Session Program

Main Platform/Special Sessions Program

OBJECTIVE

Plan and develop content for the Annual Meeting program with assistance from staff by selecting topics and speakers that benefit our global membership and assisting speakers in the preparation of their content.

STRATEGIC PLATFORMS ADDRESSED

- **Transformative Productivity:** Enabling members to achieve and surpass their personal and professional goals by capturing, curating and distributing relevant resources to become more productive.
- **Network Connectivity:** Providing opportunities for members to share ideas, connect on similar interests and build communities.

GENERAL ASSIGNMENTS

1. Read PDC Manual and complete all pre-meeting assignments in advance of first meeting.
2. With adherence to MDRT policy and procedures, develop an Annual Meeting program that:
 - Is consistent with MDRT's Strategic Plan and priorities
 - Offers programming of interest to the diverse global MDRT membership
 - Includes topics and speakers that have a global appeal
 - Reflects current industry issues and anticipates future trends
 - Offers transferable ideas that attendees can use after the meeting
 - Explores cutting-edge formats and technology to benefit target audiences and enhance interactive sessions
 - Provides opportunities and, where logistically feasible, provides a place for members to meet, network and share ideas
 - Provides members who do not attend the meeting with post-meeting access to speaker presentations
3. PDC members shall:
 - Design the program to encourage participation in all areas by Top of the Table and Court of the Table members
 - Work with speakers to develop the finest content and program sessions possible for the benefit of the membership
 - Encourage speakers to deliver a high-quality performance by providing tools to help them develop an engaging and interactive presentation
 - Design programming that appeals to all organizational levels and a multilingual attendee base, and use innovative delivery methods

4. PDC members are responsible for reviewing Annual Meeting speaker manuscripts, visual materials and handouts to assure the sharing of transferable ideas, compliance and legal adherence.
5. Collaborate with Global Conference PDC to share speaker suggestions and topics.
6. For the benefit of members, speakers are requested to submit final drafts of their presentation for inclusion in the Annual Meeting “Proceedings.”
7. Committee members are encouraged to share an idea (sales, marketing, productivity, practice management, team motivation, etc.) to be used in MDRT publications. Members are asked to submit their idea to <http://www.imdrt.org/ideas/> MDRT suggests that committees spend time during the committee dinner and meeting sharing these ideas with one another.

SPECIFIC ASSIGNMENTS

Main Platform

1. Main Platform programming shall:
 - Maintain a reasonable balance between member and nonmember speakers
 - Provide speakers who deliver a message with high-quality performance in a limited time frame
 - Provide speakers whose messages are transferable to MDRT publications, products, websites, podcasts, blogs and MDRT Academy
 - Reflect MDRT's commitment to the Whole Person concept
 - Provide motivational and inspirational speakers
 - Maintain the MDRT traditions as defined by the Executive Committee
 - Provide speakers on concepts that are universally applicable in the areas of sales, marketing, business practices, the economy and technology
 - Provide speakers who demonstrate the value of insurance (insurance action stories, member speakers)
 - Provide speakers in support of the MDRT Foundation Charity Partner where feasible and/or applicable
2. By policy, certain MDRT traditions are to be included but should not be the primary focus of the Main Platform.
3. PDC members are responsible for reviewing Annual Meeting speaker proposals, manuscripts and visual materials to assure the sharing of transferable ideas, compliance and legal adherence.
4. For the benefit of members, speakers are requested to submit final drafts of their presentation for inclusion in the Annual Meeting “Proceedings.”
5. Special Session programming shall include:
 - Speakers who can deliver a high-quality performance on topics similar to Main Platform, whose messages are most effective when delivered in a longer time period.
 - Special programming for Court of the Table/Top of the Table members as a reward for and in recognition of their achievement.
 - Speakers whose messages are transferable to MDRT publications, products, websites, podcasts, blogs and the MDRT Academy.

Focus Sessions

1. Focus Session programming shall:
 - Provide programming for concurrent educational sessions delivered in breakout format
 - Be scheduled so that it does not compete with Main Platform
 - Provide attendee-centered educational sessions utilizing formats that engage the audience and foster more effective learning
 - Maintain a reasonable balance between member and nonmember speakers
 - Provide talented and knowledgeable presenters
 - Provide educational and informational content
 - Identify non-selected speakers as appropriate for participation in the ConneXion Zone or other content, such as the Resource Zone or *Round the Table*
 - Include speakers whose messages are transferable to MDRT publications, products, websites, podcasts, blogs and MDRT Academy
 - Provide non-English language specific programming for at least top seven languages and other large language attendee groups as appropriate
2. Focus Session content should generally fit within the following areas: Protection (product technical information), Retirement/Wealth Management Strategies, Client Strategies, Practice Management, Marketing, Whole Person and Advanced Top of the Table Programming.
3. Each of the Focus Session categories should have speakers representing at least two countries, where feasible and/or applicable.

ConneXion Zone

1. ConneXion Zone programming shall:
 - Provide an alternative learning environment focused on delivering a unique attendee experience
 - Allow members to participate in the environment as speakers
 - Deliver educational content in short, interactive formats.
 - Work with all other PDC committees to identify potential speakers for preview sessions, Q&A sessions and other formats which may not be appropriate in other aspects of the program
 - Explore cutting-edge formats and technology to benefit target audiences and enhance interactive sessions
 - Provide opportunities for members to meet, network and share ideas
2. Committee members are responsible for reviewing topic submissions, titles, ideas and content for appropriateness.
3. Committee is responsible for identifying “hot topics” that may not be represented in submissions and facilitating a targeted outreach for additional materials.

SCOPE

Duties and responsibilities of this Division cover all matters concerned with the development of the content presented at the Annual Meeting and Global Conference.

The Annual Meeting PDC Steering Committee is composed of the:

- Divisional Vice President
- First Vice President, Executive Committee Liaison
- Global Council Member, Annual Meeting PDC
- Main Platform/Special Sessions Program Chair

- Focus Sessions Program Chair
- ConneXion Zone Program Chair
- Focus Session Program Assistant Chairs
- Director, Professional Development
- Applicable MDRT Staff

BUDGET:

- 1 The Program Development Division operates under the budget prepared in consultation with the Finance Committee and approved by the Executive Committee.
- 2 The Committee Functions and Operating Procedures with regard to expenses are to be followed; e.g., in-person meetings, use of MDRT's designated travel agent, coach fares, etc.
- 3 Any and all expenditures, program concepts, special events, etc., not reflected in the budget MUST be approved by the Finance and Executive Committees prior to initiation.

MEMBERSHIP

The Annual Meeting Program Development Committee consists of a Divisional Vice President; Chair, Main Platform/Special Sessions Program; Chair, Focus Session Program; Chair, ConneXion Zone Program; four members, Main Platform/Special Sessions Program; three Assistant Chairs, Focus Session Program; seven English language, a Top of the Table and eight language specific Focus Session Program Captains; and four ConneXion Zone Program Captains. MDRT members selected for these positions should meet the experience requirements established for each position.

COMMITTEE LEADERS AND STAFF

Committee Chair, Focus Sessions:	Rino V. Cipparrone, CLU, CFP
Committee Chair, Main Platform/Special Sessions:	Ana Sofía Rodriguez, MBA
Committee Chair, ConneXion Zone:	Claudio Miguel Mejia
Annual Meeting Divisional Vice President:	Craig Alan Lilley, CFP, CLU
Global Council Member:	Juli Y. McNeely, CLU, CFP
GCM Liaisons:	Jess Jurasz, Jeanne Malone, CMP
Executive Committee Liaison:	Ian James Green, DipPFS
Staff Liaisons:	Jess Jurasz, Sheila Darcy; Colleen Schneider; Katy Przybytek



MDRT

The Premier Association
of Financial Professionals®

**ANNUAL MEETING
PROGRAM GENERAL ARRANGEMENTS (PGA)
DIVISION**

OBJECTIVE

Recruit and organize the volunteer support for the on-site logistical general arrangements of the Annual Meeting program.

STRATEGIC PLATFORM ADDRESSED

- Network Connectivity – Providing opportunities for members to share ideas, connect on similar interests and build community

SPECIFIC ASSIGNMENTS

1. Implement volunteer program to assist with the logistical needs at the Annual Meeting.
2. The PGA Committee shall include the following task forces:
 - The MDRT Store Task Force is responsible for the support of the MDRT Store and for the sale of MDRT products.
 - The Meeting Involvement Task Force facilitates the recruitment of additional PGA volunteers to fill task force vacancies in advance of the meeting and on-site. This task force also maintains a booth at the meeting to assist members with questions regarding PGA and MDRT, and houses the computer to complete volunteer evaluations.
 - The Registration Task Force greets and assists members and guests attending the Annual Meeting and creates an atmosphere of excitement in the registration area and special guest office.
 - The Traffic Task Force(s) (General, Main Platform and Sessions) direct(s) and control(s) traffic before, during and after all assigned sessions and events and assist(s) in maintaining order and other responsibilities as assigned.
3. You are encouraged to submit a unique client strategy, marketing idea or practice management technique that you have used in your practice to improve productivity. Submit to <http://www.imdrt.org/ideas/> MDRT suggests that committees spend time during the committee dinner and meeting sharing submissions.

BUDGET

The PGA Division operates under a budget prepared by the staff liaison and approved by the Executive Committee. The Committee functions and operating procedures apply with regard to expenses, e.g., fly-in meetings, exclusive use of MDRT's designated travel agent, coach fares, etc. The staff liaison, Finance and Executive Committees must approve all expenditures not reflected in the budget prior to initiation.

MEMBERSHIP

The PGA Committee consists of the Global Council Member, Divisional Vice President, Committee Chairs, Directors, Assistant Directors of task forces, the Executive Committee Liaison and volunteer members.

ANNUAL MEETING PGA LEADERS AND STAFF

Committee Chair, Member Enhancement:	Brad J. Myers
Committee Chair Member Logistics:	Manuel Dy Chuaunsu Jr.
Committee Chair, Member Services:	Lesley E. Weiner, ChFC, CFP
DVP, Annual Meeting PGA:	Yuka Nakahara-Goven, MBA, CLU
Global Council Member:	Juli Y. McNeely, CFP, CLU
GCM Liaison:	Jess Jurasz, Jeanne Malone, CMP
Executive Committee Liaison:	Ian James Green, DipPFS
Staff Liaisons:	Jeanne Malone, CMP and Anne Dignan, CMP



MDRT

The Premier Association
of Financial Professionals®

FINANCE COMMITTEE

FINANCE DIVISION

OBJECTIVE

Serve the Executive Committee in an advisory capacity in all matters relating to Million Dollar Round Table (MDRT) budgets, investments and fiscal planning.

SPECIFIC ASSIGNMENTS

1. Pre-meeting assignment: Identify a subject to share with MDRT members on budgets, investments or fiscal planning.
 - Submit an idea to <http://www.imdrt.org/ideas/> MDRT suggests that committees spend time during the committee dinner and meeting sharing submissions.
2. Study, appraise and make recommendations to the Executive Committee on MDRT annual budgets, including contingency funds for new initiatives developed through MDRT operating procedures and approved by decision-making bodies.
3. Evaluate the membership dues for the next fiscal year.
4. Review the year-end audit report with the external auditor and make recommendations to the Executive Committee, if necessary.
5. With investment counsel, review the investment policy statement and portfolio results versus the benchmarks established in the investment policy statement.
6. The Global Council Member is responsible for contributing to the finance report for publication in the May/June issue of *Round the Table*.

MEMBERSHIP

The committee shall be composed of a chair and committee members appointed by the Executive Committee. The composition of the committee should ideally accommodate a rotation of members to ensure continuity one year after the next.

COMMITTEE LEADERS AND STAFF

Global Council Member: Aurora L. Tancock, FLMI, CFP
Executive Committee Liaison: Ross Vanderwolf, CFP
Staff Liaisons: Stephen P. Stahr, CAE



GLOBAL CONFERENCE PROGRAM DEVELOPMENT COMMITTEES

ConneXion Zone Program
Focus Session Program
Main Platform/Special Sessions Program

OBJECTIVE

Plan and develop content for the Global Conference program with assistance from staff by selecting topics and speakers that benefit our global membership and assisting speakers in the preparation of their content.

STRATEGIC PLATFORMS ADDRESSED

- **Transformative Productivity:** Enabling members to achieve and surpass their personal and professional goals by capturing, curating and distributing relevant resources to become more productive
- **Network Connectivity:** Providing opportunities for members to share ideas, connect on similar interests and build communities

GENERAL ASSIGNMENTS

1. Read PDC Manual and complete all pre-meeting assignments in advance of first meeting.
2. With adherence to MDRT policy and procedures, develop a Global Conference program that:
 - Is consistent with MDRT's Strategic Plan and priorities
 - Offers programming of interest to the diverse global MDRT membership
 - Includes topics and speakers that have a global appeal
 - Reflects current industry issues and anticipates future trends
 - Offers transferable ideas that attendees can use after the meeting
 - Explores cutting-edge formats and technology to benefit target audiences and enhance interactive sessions
 - Provides opportunities and, where logistically feasible, provides a place for members to meet, network and share ideas
 - Provides members who do not attend the meeting with post-meeting access to speaker presentations
3. Global Conference PDC members shall:
 - Design the program to encourage participation in all areas by Top of the Table and Court of the Table members
 - Work with speakers to develop the finest content and program sessions possible for the benefit of the membership
 - Encourage speakers to deliver a high-quality performance by providing tools to help them develop an engaging and interactive presentation
 - Design programming that appeals to all organizational levels and a multilingual attendee base, and use innovative delivery methods

4. Global Conference PDC members are responsible for reviewing Global Conference speaker manuscripts, visual materials and handouts to assure the sharing of transferable ideas, compliance and legal adherence
5. Collaborate with Annual Meeting PDC to share speaker suggestions and topics.
6. For the benefit of members, speakers are requested to submit final drafts of their presentation for inclusion in the Global Conference “Proceedings.”
7. Committee members are encouraged to share an idea (sales, marketing, productivity, practice management, team motivation, etc.) to be used in MDRT publications. Members are asked to submit their idea to <http://www.imdrt.org/ideas/>. MDRT suggests that committees spend time during the committee dinner and meeting sharing these ideas with one another.

SPECIFIC ASSIGNMENTS

Main Platform

1. Main Platform programming shall:
 - Maintain a reasonable balance between member and nonmember speakers
 - Provide speakers who deliver a message with high-quality performance in a limited time frame
 - Provide speakers whose messages are transferable to MDRT publications, products, websites, podcasts and blogs and the MDRT Academy
 - Reflect MDRT's commitment to the Whole Person concept
 - Provide motivational and inspirational speakers
 - Maintain the MDRT traditions as defined by the Executive Committee
 - Provide speakers on concepts that are universally applicable in the areas of sales, marketing, business practices, the economy and technology
 - Provide speakers who demonstrate the value of insurance (insurance action stories, member speakers)
 - Provide speakers in support of the MDRT Foundation Charity Partner where feasible and/or applicable
2. By policy, certain MDRT traditions are to be included but should not be the primary focus of Main Platform.
3. Global Conference PDC members are responsible for reviewing Global Conference speaker proposals, manuscripts and visual materials to assure the sharing of transferable ideas, compliance and legal adherence.
4. Special Session programming shall include:
 - Speakers who can deliver a high-quality performance on topics similar to Main Platform, whose messages are most effective when delivered in a longer time period
 - Special programming for Court of the Table/Top of the Table members as a reward for and in recognition of their achievement
 - Speakers whose messages are transferable to MDRT publications, products, websites, podcasts and blogs and the MDRT Academy

Focus Sessions

1. Focus Session programming shall:

- Provide programming for concurrent educational sessions delivered in breakout format
 - Be scheduled so that it does not compete with Main Platform
 - Provide attendee-centered educational sessions utilizing formats that engage the audience and foster more effective learning
 - Maintain a reasonable balance between member and nonmember speakers
 - Provide talented and knowledgeable presenters
 - Provide educational and informational content
 - Identify non-selected speakers as appropriate for participation in the ConneXion Zone or other content, such as the Resource Zone or *Round the Table*
 - Include speakers whose messages are transferable to MDRT publications, products, websites, podcasts and blogs and the MDRT Academy
 - Provide non-English language-specific programming for at least the top seven languages and other large language attendee groups as appropriate
2. Focus Session content should generally fit within the following areas: Protection (product technical information), Retirement/Wealth Management Strategies, Client Strategies, Practice Management, Marketing, Whole Person and Advanced Top of the Table Programming.
 3. Each of the Focus Session categories should have speakers representing at least two countries, where feasible and/or applicable.

ConneXion Zone

1. ConneXion Zone programming shall:
 - Provide an alternative learning environment focused on delivering a unique attendee experience
 - Allow members to participate in the environment as speakers
 - Deliver educational content in short, interactive formats
 - Work with all other PDC committees to identify potential speakers for preview sessions, Q&A sessions and other formats which may not be appropriate in other aspects of the program
 - Explore cutting-edge formats and technology to benefit target audiences and enhance interactive sessions
 - Provide opportunities for members to meet, network and share ideas
2. Committee members are responsible for reviewing topic submissions, titles, ideas and content for appropriateness.
3. The committee is responsible for identifying “hot topics” that may not be represented in submissions and facilitating a targeted outreach for additional materials.

SCOPE

Duties and responsibilities of this Division cover all matters concerned with the development of the content presented at the Global Conference.

The Global Conference PDC Steering Committee is composed of the:

- Divisional Vice President
- First Vice President, Executive Committee Liaison
- Global Council Member, Global Conference PDC
- Main Platform/Special Sessions Program Chair
- Focus Sessions Program Chair

- ConneXion Zone Program Chair
- Focus Session Program Assistant Chairs
- Director, Professional Development
- Applicable MDRT staff

BUDGET

- 1 The Program Development Division operates under the budget prepared in consultation with the Finance Committee and approved by the Executive Committee.
- 2 The Committee Functions and Operating Procedures with regard to expenses are to be followed; e.g., in-person meetings, use of MDRT's designated travel agent, coach fares, etc.
- 3 Any and all expenditures, program concepts, special events, etc., not reflected in the budget MUST be approved by the Finance and Executive Committees prior to initiation.

MEMBERSHIP

The Global Conference Program Development Committee consists of a Divisional Vice President; Chair, Main Platform/Special Sessions Program; Chair, Focus Session Program; Chair, ConneXion Zone Program; four members, Main Platform/Special Sessions Program; two Assistant Chairs, Focus Session Program; nine Focus Session Program Captains; and four ConneXion Zone Program Captains. MDRT members selected for these positions should meet the experience requirements established for each position.

COMMITTEE LEADERS AND STAFF

Chair, Focus Sessions:	Tse Lap Yee Stanley
Chair, Main Platform/Special Sessions:	Tse Pui Chi Jacqueline
Chair, ConneXion Zone:	Herold Chen, CFP
Divisional Vice President:	Rajesh Chheda, ACA, CFP
Global Council Member:	Juli Y. McNeely, CLU, CFP
GCM Liaisons:	Jess Jurasz, Jeanne Malone, CMP
Executive Committee	Ian James Green, DipPFS
Liaison: Staff Liaisons:	Jess Jurasz, Valerie Fontanetta, Katy Przybytek, Norah Webster, CMP



The Premier Association
of Financial Professionals®

GLOBAL CONFERENCE PROGRAM GENERAL ARRANGEMENTS (PGA) DIVISION

OBJECTIVE

Recruit and organize the volunteer support for the on-site logistical general arrangement needs of the Global Conference.

STRATEGIC PLATFORM ADDRESSED

- Network Connectivity – Providing opportunities for members to share ideas, connect on similar interests and build community

SPECIFIC ASSIGNMENTS

1. Implement a volunteer program to assist with on-site logistical needs at the Global Conference.
2. The PGA Committee shall consist of the following task forces:
 - The Traffic Task Force(s) (Main Platform, Sessions and General) direct(s) and control(s) traffic before, during and after all assigned sessions and events to maintain order and other responsibilities as assigned.
 - The Speaker Relations Task Force assists speakers appearing on Main Platform and other sessions when a speaker host is indicated, and coordinate(s) with the respective Program Development Committee member. ExCom Escorts, as warranted, will report to the Speaker Relations Director.
 - The Registration Task Force greets and assists members and guests attending the Global Conference and creates an atmosphere of excitement in the registration area and special guest office.
 - The MDRT Store Task Force is responsible for the support of the MDRT Store and for the sale of MDRT products.
 - The Meeting Involvement Task Force facilitates the recruitment of additional PGA volunteers to fill task force vacancies in advance of the meeting and on-site. This task force also maintains a booth at the meeting to assist members with questions regarding PGA and MDRT, and houses the computer to complete volunteer evaluations.
3. You are encouraged to submit a unique client strategy, marketing idea or practice management technique that you have used in your practice to improve productivity. Submit to <http://www.imdrt.org/ideas/>. MDRT suggest that committees spend time during the committee dinner and meeting sharing submissions.

BUDGET

The Global Conference PGA Division operates under a budget prepared by the staff liaison and approved by the Executive Committee. The Committee functions and operating procedures apply with regard to expenses, e.g., fly-in meetings, exclusive use of MDRT's designated travel agent, coach fares, etc. The staff liaison, Finance and Executive Committees must approve all expenditures not reflect in the budge prior to initiation.

MEMBERSHIP

The Global Conference PGA Committee consists of a Global Council Member, Divisional Vice President, Chairs, Directors, Assistant Directors and Volunteer Members.

GLOBAL CONFERENCE PGA LEADERS AND STAFF

Chair, Member Logistics:	Glen Alexander Winata
Chair, Member Services:	Hidenori Miki, TLC
DVP, Global Conference PGA:	Pecky Wong So Ping, FChFP, MBA
Global Council Member:	Juli Y. McNeely, CFP, CLU
GCM Liaisons:	Jess Jurasz, Jeanne Malone, CMP
Executive Committee Liaison:	Ian James Green, DipPFS
Staff Liaisons:	Jeanne Malone, CMP



MDRT

The Premier Association
of Financial Professionals®

MEMBERSHIP COMMUNICATION COMMITTEES (MCCs)

Region A – Zones 10 and 13

Region B – Zones 9 and 11

Region C – Zones 12 and 04

MEMBERSHIP COMMUNICATION DIVISION 1

OBJECTIVE

Actively promote MDRT membership to current and potential members worldwide. Monitor industry activities and involvement worldwide, and serve as a two-way communication link between MDRT leadership and the membership at large. Convey MDRT information to members and potential members through companies and industry associations.

STRATEGIC PLATFORMS ADDRESSED

- Transformative Productivity: Enabling members to achieve and surpass their personal and professional goals by capturing, curating and distributing relevant resources to become more productive
- Network Connectivity: Providing opportunities for members to share ideas, connect on similar interests and build community

SPECIFIC ASSIGNMENTS

1. Identify, appoint and train a network of members to serve on the MCC as Country, Area, State and Local Chairs within the zone.
2. Develop a comprehensive plan, with implementation steps, for how to best promote MDRT and improve membership recruitment and retention within the zone.
3. Identify the ways that members in your region/zone can best engage with MDRT and benefit from their membership.
4. Identify the member benefits that are most valuable to the members in your region/zone.
5. Promote the MDRT Mentoring Program, and encourage members and prospective members to enroll in the program.
6. Communicate and promote MDRT's member benefits that would enable members and prospective members in your region/zone to achieve and surpass their personal and professional goals.

7. Recommend best methods for communicating the value of MDRT membership relevant to the unique needs of those in your region/zone to members and prospective members.
8. Recommend what new membership programs or services might be developed or what existing programs and services might be enhanced or deleted to improve membership recruitment and retention results.
9. Recommend ways in which MDRT might strengthen its relationships with companies, associations and other organizations in your zone/region to attract and retain members.
10. You are encouraged to submit a unique client strategy, marketing idea or practice management technique that you have used in your practice to improve productivity. Submit to <http://www.imdrt.org/ideas/>. MDRT suggests that committees spend time during the committee dinner and meeting sharing submissions.

COMMITTEE LEADERS AND STAFF

Global Council Member: Priti Ajit Kucheria, LUTCF, CFP

Committee Chair - Region A - Zones 10 and 13: Mathew Thomas Fogarty, CFP, DipFP

Committee Chair - Region B - Zones 9 and 11: Herman Colin, LUTCF, CLI

Committee Chair - Region C - Zones 12 and 04: Manu Dhawan

Executive Committee Liaisons: Randy Scritchfield, CFP, LUTCF; Peggy Tsai, RFP, CCFP

Staff Liaisons: Sarah Estrella, Mofya Kabwe, Lena Bykhovsky, Lena Polishuk



MEMBERSHIP COMMUNICATION COMMITTEES (MCCs)

Region D – Zones 5 and 6

Region E – Zones 2, 3 and 7

Region F – Zones 14

MEMBERSHIP COMMUNICATION DIVISION 2

OBJECTIVE

Actively promote MDRT membership to current and potential members worldwide. Monitor industry activities and involvement worldwide, and serve as a two-way communication link between MDRT leadership and the membership at large. Convey MDRT information to members and potential members through companies and industry associations.

STRATEGIC PLATFORMS ADDRESSED

- **Transformative Productivity:** Enabling members to achieve and surpass their personal and professional goals by capturing, curating and distributing relevant resources to become more productive
- **Network Connectivity:** Providing opportunities for members to share ideas, connect on similar interests and build community

SPECIFIC ASSIGNMENTS

1. Identify, appoint and train a network of members to serve on the MCC as Country, Area, State and Local Chairs within the zone.
2. Develop a comprehensive plan, with implementation steps, for how to best promote MDRT and improve membership recruitment and retention within the zone.
3. Identify the ways that members in your region/zone can best engage with MDRT and benefit from their membership.
4. Identify the member benefits that are most valuable to the members in your region/zone.
5. Promote the MDRT Mentoring Program, and encourage members and prospective members to enroll in the program.
6. Communicate and promote MDRT's member benefits that would enable members and prospective members in your region/zone to achieve and surpass their personal and professional goals.
7. Recommend best methods for communicating the value of MDRT membership relevant to the unique needs of those in your region/zone to members and prospective members.
8. Recommend what new membership programs or services might be developed or what existing programs and services might be enhanced or deleted to improve membership recruitment and retention results.

9. Recommend ways in which MDRT might strengthen its relationships with companies, associations and other organizations in your zone/region to attract and retain members.

10. You are encouraged to submit a unique client strategy, marketing idea or practice management technique that you have used in your practice to improve productivity. Submit to <http://www.imdrt.org/ideas/>. MDRT suggests that committees spend time during the committee dinner and meeting sharing submissions.

COMMITTEE LEADERS AND STAFF

Global Council Member: Sung Man Park

Committee Chair - Region D - Zones 5 and 6: Yuji Uchikawa, AFP

Committee Chair - Region E - Zones 2, 3 and 7: Eunice Chen

Committee Chair - Region F - Zone 14: Pornprapa Sukreepirom, MBA

Executive Committee Liaisons: Randy L. Scritchfield, CFP, LUTCF and Peggy Tsai, RFP, CCFP

Staff Liaisons: Jennifer Chen, Mofya Kabwe, Yuna Kim



MDRT

The Premier Association
of Financial Professionals®

INDEPENDENT CHANNEL TASK FORCE

MCC DIVISION 3

OBJECTIVE

Explore the independent channel to identify opportunities for MDRT within this segment.

STRATEGIC PLATFORMS ADDRESSED

- Transformative Productivity – Enabling members to achieve and surpass their personal and professional goals by capturing, curating and distributing relevant resources to become more productive
- Stronger Together – Establishing relationships with companies, associations and other external organizations to attract and retain members, adding value to key allies and enhancing organizational capabilities

FOCUS AREAS

The task force will:

- Identify and discuss the independent channel
 - What are the characteristics of independent agents?
 - What are their needs and how are those needs similar to and/or different from tied agents?
 - How are their needs currently being fulfilled? Are there unmet needs that MDRT could fulfill?
- Identify MDRT resources/offerings that appeal to the independent channel market and suggest approaches for positioning these resources/offerings to the independent channel
- Explore effective ways MDRT can reach independent agents such as via industry associations, BGA/IMO/broker-dealer partnerships and other opportunities
- Identify ways MDRT can complement education, practice management best practices and communities offered by BGA/IMO/broker-dealers
 - What support do BGA/IMOs/broker-dealers provide to the next generation of producers (new agents entering the business)?
 - How does the support provided differ from what new agents receive when in a tied agency environment?
 - What can MDRT offer this segment of new agents?

PRE-WORK/ACTION ITEMS

TBD

TASK FORCE LEADERS AND STAFF

Task Force Chair:	William J. Rossi, CFP, ChFC
Global Council Member:	Marc A. Silverman, CFP, ChFC
Executive Committee Liaison:	Randy L. Scritchfield, CFP, LUTCF
Staff Liaisons:	Barbara O'Connor, Jennifer Schimka



MDRT

The Premier Association
of Financial Professionals®

EDGE AND CONTENT TASK FORCE
MCC DIVISION 3

OBJECTIVE

Identify content and content experts on topics of interest to U.S. and Canadian members for the 2020 MDRT EDGE as well as the MDRT Resource Zone and other MDRT publications.

STRATEGIC PLATFORMS ADDRESSED

- **Transformative Productivity:** Enabling members to achieve and surpass their personal and professional goals by capturing, curating and distributing relevant resources to become more productive
- **Network Connectivity:** Providing opportunities for members to share ideas, connect on similar interests and build communities
- **Guided Development:** Leveraging the coaching expertise of members and outside experts to assist members seeking to integrate further in the MDRT community
- **Celebrating Achievement:** Awareness, recognition and celebration of member achievements that align with MDRT's high standard of excellence

SPECIFIC ASSIGNMENTS

- Identify trending "hot topics," content and content experts that appeal to MDRT members in the U.S. and Canadian markets.
- Evaluate learning objectives for the 2020 MDRT EDGE.
- Recommend and select member and non-member experts to facilitate workshops at the 2020 EDGE that reflect current industry issues, anticipate future trends and offer transferable ideas that attendees can use after the meeting.
- Participate in initial planning calls with selected content experts for their workshops at the 2020 EDGE.
- Evaluate a short list of Anchor speaker options and make final selections for the 2020 EDGE program.
- Assist with the development of the EDGE Peer Group program.
- Participate in grassroots efforts to promote attendance at the 2020 EDGE.

TASK FORCE LEADERS AND STAFF

Task Force Chair:	Benjamin Harding, CFP, ChFC
Global Council Member:	Marc A. Silverman, CFP, ChFC
Executive Committee Liaison:	Ross Vanderwolf, CFP
Staff Liaisons:	Andrea Boetticher, Matt Pais



MDRT

The Premier Association
of Financial Professionals®

COMMUNITY LEADERS
MEMBERSHIP COMMUNICATION DIVISION 3
U.S. and Canada

OBJECTIVE

Represent MDRT to promote membership and increase member engagement among peers in the local community.

STRATEGIC PLATFORMS ADDRESSED

- Network Connectivity: Providing opportunities for members to share ideas, connect on similar interests and build communities

FOCUS AREAS

- Be an advocate for MDRT when attending industry and company meetings.
- Create community and engagement by organizing and promoting Local Area Networking (LAN) gatherings for members, nonmembers and MDRT Mentoring Program participants. The purpose of these gatherings is to provide local MDRT community members an opportunity to connect in creative and innovative ways and communicate the benefits of MDRT membership. MDRT has set a budget for each state and province to use toward the cost of the LAN gathering.

MEMBER LEADERS AND STAFF

Chair: David C. Blake and Dana Mitchell, CFP, CLU
Global Council Member: Marc A. Silverman, CFP, ChFC
Executive Committee Liaisons: Randy L. Scritchfield, CFP, LUTCF and Peggy Tsai, RFP, CCFP
Staff Liaisons: Lena Bykhovsky and Lena Polishuk



MDRT

The Premier Association
of Financial Professionals®

ACQUISITION OF YOUNGER CLIENTS TASK FORCE **MEMBER RESOURCES BEST PRACTICES DIVISION 1**

OBJECTIVE

Identify successful strategies for acquiring, advising and communicating with millennial clients.

STRATEGIC PLATFORMS ADDRESSED

- **Transformative Productivity:** Enabling members to achieve and surpass their personal and professional goals by capturing, curating and distributing relevant resources to become more productive
- **Network Connectivity:** Providing opportunities for members to share ideas, connect on similar interests and build communities

FOCUS AREAS

The task force will discuss how to:

- Develop multi-generational relationships with existing clients
- Understand the specific needs of this demographic and suggest appropriate communication and service approaches
- Recognize unique challenges of working with millennials and identify solutions to navigate roadblocks

PRE-WORK/ACTION ITEMS

Prior to our task force meeting, each of you will interview other MDRT members on topics relevant to this task force's objective and share case studies of the situations listed above. This work will provide additional insights for the discussions during our meeting. It will also be shared with the MDRT membership in a variety of formats (such as podcast episodes, videos, blog posts or magazine articles) by MDRT's staff content team. You are also encouraged to submit a unique client strategy, marketing idea or practice management technique that you have used in your practice to improve productivity. Submit to <http://www.imdrt.org/ideas/>.

TASK FORCE LEADERS AND STAFF

Task Force Chair: Matthew T. Hoesly, CFP, ChFC
Global Council Member: Hamilton P. Poynor, CLU, AEP
Executive Committee Liaison: Peggy Tsai, RFP, CCFP
Staff Liaisons: Wanda Dixon and Matt Pais

MEMBER RESOURCES BEST PRACTICES DIVISION 1

Discuss and ultimately share with the membership successful strategies members use when working *in* their business (working directly with clients).

MDRT thanks you in advance for your time and contributions. Task forces play an important role in developing content and educating the MDRT membership. MDRT's staff records the ideas shared, determines how to best share with members and sees the ideas through to completion. Contributions and discussions may be used in whole, used in part, modified, distributed or released in accordance with MDRT's Content Strategy.



MDRT

The Premier Association
of Financial Professionals®

ADVANCE PLANNING TASK FORCE

MEMBER RESOURCES BEST PRACTICES DIVISION 1

OBJECTIVE

Identify repeatable processes to effectively communicate complex business strategies to clients.

STRATEGIC PLATFORMS ADDRESSED

- **Transformative Productivity:** Enabling members to achieve and surpass their personal and professional goals by capturing, curating and distributing relevant resources to become more productive
- **Network Connectivity:** Providing opportunities for members to share ideas, connect on similar interests and build communities

FOCUS AREAS

The task force will discuss how to:

- Work in cooperation with other professional advisors to build comprehensive solutions for clients
- Create new benefits for business owners and their employees
- Identify the next level of planning for ultra-high-net-worth clients (tax planning, wealth transfer)

PRE-WORK/ACTION ITEMS

Prior to our task force meeting, each of you will interview other MDRT members on topics relevant to this task force's objective and share case studies of the situations listed above. This work will provide additional insights for the discussions during our meeting. It will also be shared with the MDRT membership in a variety of formats (such as podcast episodes, videos, blog posts or magazine articles) by MDRT's staff content team. You are also encouraged to submit a unique client strategy, marketing idea or practice management technique that you have used in your practice to improve productivity. Submit to <http://www.imdrt.org/ideas/>

TASK FORCE LEADERS AND STAFF

Task Force Chair:	D. Kyle Atkins, CFP, CLU
Global Council Member:	Hamilton P. Poynor, CLU, AEP
Executive Committee Liaison:	Peggy Tsai, RFP, CCFP
Staff Liaisons:	Colette Kostakos and Antoinette Tuscano

MEMBER RESOURCES BEST PRACTICES DIVISION 1

Discuss and ultimately share with the membership successful strategies members use when working *in* their business (working directly with clients).

MDRT thanks you in advance for your time and contributions. Task forces play an important role in developing content and educating the MDRT membership. MDRT's staff records the ideas shared, determines how to best share with members and sees the ideas through to completion. Contributions and discussions may be used in whole, used in part, modified, distributed or released in accordance with MDRT's Content Strategy.



MDRT

The Premier Association
of Financial Professionals®

**WEALTH MANAGEMENT TASK FORCE
MEMBER RESOURCES BEST PRACTICES DIVISION 1**

OBJECTIVE

Identify successful approaches for advising clients on investment and economic trends and discuss how to move from a risk-based practice to an integrated wealth management model.

STRATEGIC PLATFORMS ADDRESSED

- Transformative Productivity: Enabling members to achieve and surpass their personal and professional goals by capturing, curating and distributing relevant resources to become more productive
- Network Connectivity: Providing opportunities for members to share ideas, connect on similar interests and build communities

FOCUS AREAS

The task force will discuss how to:

- Effectively communicate complex economic information to clients
- Help clients understand the rationale for recommendations presented by the advisor
- Move from a risk-based practice to a more integrated wealth management model
- Help clients plan for their income in retirement
- Advise clients on new investment opportunities, such as cryptocurrency

PRE-WORK/ACTION ITEMS

Prior to our task force meeting, each of you will interview other MDRT members on topics relevant to this task force's objective and share case studies of the situations listed above. This work will provide additional insights for the discussions during our meeting. It will also be shared with the MDRT membership in a variety of formats (such as podcast episodes, videos, blog posts or magazine articles) by MDRT's staff content team. You are also encouraged to submit a unique client strategy, marketing idea or practice management technique that you have used in your practice to improve productivity. Submit to <http://www.imdrt.org/ideas/>.

TASK FORCE LEADERS AND STAFF

Task Force Chair: Elaine Milne, DipPFS
Global Council Member: Hamilton P. Poynor, CLU, AEP
Executive Committee Liaison: Peggy Tsai, RFP, CCFP
Staff Liaisons: Colette Kostakos and Mike DePilla

MEMBER RESOURCES BEST PRACTICES DIVISION 1

Discuss and ultimately share with the membership successful strategies members use when working *in* their business (working directly with clients).

MDRT thanks you in advance for your time and contributions. Task forces play an important role in developing content and educating the MDRT membership. MDRT's staff records the ideas shared, determines how to best share with members and sees the ideas through to completion. Contributions and discussions may be used in whole, used in part, modified, distributed or released in accordance with MDRT's Content Strategy.



MDRT

The Premier Association
of Financial Professionals®

BUSINESS DEVELOPMENT TASK FORCE
MEMBER RESOURCES BEST PRACTICES DIVISION 2

OBJECTIVE

Identify best practices and strategies members implement when evolving and developing their business.

STRATEGIC PLATFORMS ADDRESSED

- **Transformative Productivity:** Enabling members to achieve and surpass their personal and professional goals by capturing, curating and distributing relevant resources to become more productive
- **Network Connectivity:** Providing opportunities for members to share ideas, connect on similar interests and build communities

FOCUS AREAS

The task force will discuss how to:

- Identify opportunities to evolve a business
- Implement successful strategies for developing a business plan and setting goals (for example, focusing on a niche, identifying and articulating unique value)
- Make the leap from thinking like a salesperson to thinking like a business owner
- Develop a plan for business continuity

PRE-WORK/ACTION ITEMS

Prior to our task force meeting, each of you will interview other MDRT members on topics relevant to this task force's objective and share case studies of the situations listed above. This work will provide additional insights for the discussions during our meeting. It will also be shared with the MDRT membership in a variety of formats (such as podcast episodes, videos, blog posts or magazine articles) by MDRT's staff content team. You are also encouraged to submit a unique client strategy, marketing idea or practice management technique that you have used in your practice to improve productivity. Submit to <http://www.imdrt.org/ideas/>.

TASK FORCE LEADERS AND STAFF

Task Force Chair:	J. Forrester DeBuys III, CLU, ChFC
Global Council Member:	Paresh B. Shah, CFP
Executive Committee Liaison:	Peggy Tsai, RFP, CCFP
Staff Liaisons:	Colette Kostakos and Mike DePilla

MEMBER RESOURCES BEST PRACTICES DIVISION 2

Discuss and ultimately share with the membership successful strategies members use when working *in* their business (working directly with clients).

MDRT thanks you in advance for your time and contributions. Task forces play an important role in developing content and educating the MDRT membership. MDRT's staff records the ideas shared, determines how to best share with members and sees the ideas through to completion. Contributions and discussions may be used in whole, used in part, modified, distributed or released in accordance with MDRT's Content Strategy.



MDRT

The Premier Association
of Financial Professionals®

PRACTICE MANAGEMENT TASK FORCE MEMBER RESOURCES BEST PRACTICES DIVISION 2

OBJECTIVE

Identify best practices for advisors to implement in their businesses.

STRATEGIC PLATFORMS ADDRESSED

- **Transformative Productivity:** Enabling members to achieve and surpass their personal and professional goals by capturing, curating and distributing relevant resources to become more productive
- **Network Connectivity:** Providing opportunities for members to share ideas, connect on similar interests and build communities

FOCUS AREAS

The task force will discuss:

- Case management, time management, client services record-keeping and other activities associated with business operations
- Business processes and providing better service to clients by using software and technology
- Successful marketing tactics to build your personal brand and differentiate your company

PRE-WORK/ACTION ITEMS

Prior to our task force meeting, each of you will interview other MDRT members on topics relevant to this task force's objective and share case studies of the situations listed above. This work will provide additional insights for the discussions during our meeting. It will also be shared with the MDRT membership in a variety of formats (such as podcast episodes, videos, blog posts or magazine articles) by MDRT's staff content team. You are also encouraged to submit a unique client strategy, marketing idea or practice management technique that you have used in your practice to improve productivity. Submit to <http://www.imdrt.org/ideas/>.

TASK FORCE LEADERS AND STAFF

Task Force Chair: Thomas F. Levasseur, CLU, CLTC
Global Council Member: Paresh B. Shah, CFP
Executive Committee Liaison: Peggy Tsai, RFP, CCFP
Staff Liaisons: Colette Kostakos and Katie Keuneke

MEMBER RESOURCES BEST PRACTICES DIVISION 2

Discuss and ultimately share with the membership successful strategies members use when working *in* their business (working directly with clients).

MDRT thanks you in advance for your time and contributions. Task forces play an important role in developing content and educating the MDRT membership. MDRT's staff records the ideas shared, determines how to best share with members and sees the ideas through to completion. Contributions and discussions may be used in whole, used in part, modified, distributed or released in accordance with MDRT's Content Strategy.



MDRT

The Premier Association
of Financial Professionals®

STAFF DEVELOPMENT TASK FORCE
MEMBER RESOURCES BEST PRACTICES DIVISION 2

OBJECTIVE

Identify challenges and solutions related to hiring and managing staff.

STRATEGIC PLATFORMS ADDRESSED

- Transformative Productivity: Enabling members to achieve and surpass their personal and professional goals by capturing, curating and distributing relevant resources to become more productive
- Network Connectivity: Providing opportunities for members to share ideas, connect on similar interests and build communities

FOCUS AREAS

The task force will discuss how to:

- Determine when to hire and what skill sets to look for
- Compensate and engage staff for lasting employment
- Train staff in your business processes

PRE-WORK/ACTION ITEMS

Prior to our task force meeting, each of you will interview other MDRT members on topics relevant to this task force's objective and share case studies of the situations listed above. This work will provide additional insights for the discussions during our meeting. It will also be shared with the MDRT membership in a variety of formats (such as podcast episodes, videos, blog posts or magazine articles) by MDRT's staff content team. You are also encouraged to submit a unique client strategy, marketing idea or practice management technique that you have used in your practice to improve productivity. Submit to <http://www.imdrt.org/ideas/>.

TASK FORCE LEADERS AND STAFF

Task Force Chair: Diane L. McCurdy, CFP, EPC
Global Council Member: Paresh B. Shah, CFP
Executive Committee Liaison: Peggy Tsai, RFP, CCFP
Staff Liaisons: Colette Kostakos and Matt Pais

MEMBER RESOURCES BEST PRACTICES DIVISION 2

Discuss and ultimately share with the membership successful strategies members use when working *in* their business (working directly with clients).

MDRT thanks you in advance for your time and contributions. Task forces play an important role in developing content and educating the MDRT membership. MDRT's staff records the ideas shared, determines how to best share with members and sees the ideas through to completion. Contributions and discussions may be used in whole, used in part, modified, distributed or released in accordance with MDRT's Content Strategy.



MDRT

The Premier Association
of Financial Professionals®

ACQUISITION OF YOUNGER CLIENTS TASK FORCE **MEMBER RESOURCES BEST PRACTICES DIVISION 3**

OBJECTIVE

Identify successful strategies for acquiring, advising and communicating with millennial clients.

STRATEGIC PLATFORMS ADDRESSED

- **Transformative Productivity:** Enabling members to achieve and surpass their personal and professional goals by capturing, curating and distributing relevant resources to become more productive
- **Network Connectivity:** Providing opportunities for members to share ideas, connect on similar interests and build communities

FOCUS AREAS

The task force will discuss how to:

- Develop multi-generational relationships with existing clients
- Identify the advantages of working with millennial clients
- Address the needs of sandwich generation clients who care for aging parents and children

PRE-WORK/ACTION ITEMS

Prior to our task force meeting, each of you will interview other MDRT members on topics relevant to this task force's objective and share case studies of the situations listed above. This work will provide additional insights for the discussions during our meeting. It will also be shared with the MDRT membership in a variety of formats (such as podcast episodes, videos, blog posts or magazine articles) by MDRT's staff content team. You are also encouraged to submit a unique client strategy, marketing idea or practice management technique that you have used in your practice to improve productivity. Submit to <http://www.imdrt.org/ideas/>.

TASK FORCE LEADERS AND STAFF

Task Force Chair: Lucia Dewani Soeradji
Global Council Member: Rickson Joel Dsouza
Executive Committee Liaison: Peggy Tsai, RFP, CCFP
Staff Liaisons: Pamela Brown, CAE, CMP, Liz DeCarlo

MEMBER RESOURCES BEST PRACTICES DIVISION 3

Discuss and ultimately share with the membership successful strategies members use when working *in* their business (working directly with clients).

MDRT thanks you in advance for your time and contributions. Task forces play an important role in developing content and educating the MDRT membership. MDRT's staff records the ideas shared, determines how to best share with members and sees the ideas through to completion. Contributions and discussions may be used in whole, used in part, modified, distributed or released in accordance with MDRT's Content Strategy.



MDRT

The Premier Association
of Financial Professionals®

ADVANCE PLANNING TASK FORCE
MEMBER RESOURCES BEST PRACTICES DIVISION 3

OBJECTIVE

Identify repeatable processes to effectively communicate complex business strategies to clients.

STRATEGIC PLATFORMS ADDRESSED

- Transformative Productivity: Enabling members to achieve and surpass their personal and professional goals by capturing, curating and distributing relevant resources to become more productive
- Network Connectivity: Providing opportunities for members to share ideas, connect on similar interests and build communities

FOCUS AREAS

The task force will discuss how to:

- Create new benefits for business owners and their employees
- Build comprehensive solutions for high-net-worth clients

PRE-WORK/ACTION ITEMS

Prior to our task force meeting, each of you will interview other MDRT members on topics relevant to this task force's objective and share case studies of the situations listed above. This work will provide additional insights for the discussions during our meeting. It will also be shared with the MDRT membership in a variety of formats (such as podcast episodes, videos, blog posts or magazine articles) by MDRT's staff content team. You are also encouraged to submit a unique client strategy, marketing idea or practice management technique that you have used in your practice to improve productivity. Submit to <http://www.imdrt.org/ideas/>.

TASK FORCE LEADERS AND STAFF

Task Force Chair: Mohamad Manmohan Abdullah, ChFC, CLU
Global Council Member: Rickson Joel Dsouza
Executive Committee Liaison: Peggy Tsai, RFP, CCFP
Staff Liaisons: Pamela Brown, CAE, CMP, Liz DeCarlo

MEMBER RESOURCES BEST PRACTICES DIVISION 3

Discuss and ultimately share with the membership successful strategies members use when working *in* their business (working directly with clients).

MDRT thanks you in advance for your time and contributions. Task forces play an important role in developing content and educating the MDRT membership. MDRT's staff records the ideas shared, determines how to best share with members and sees the ideas through to completion. Contributions and discussions may be used in whole, used in part, modified, distributed or released in accordance with MDRT's Content Strategy.



MDRT

The Premier Association
of Financial Professionals®

RETIREMENT PLANNING TASK FORCE
MEMBER RESOURCES BEST PRACTICES DIVISION 3

OBJECTIVE

Identify successful approaches for advising clients on saving and investing for retirement.

STRATEGIC PLATFORMS ADDRESSED

- Transformative Productivity: Enabling members to achieve and surpass their personal and professional goals by capturing, curating and distributing relevant resources to become more productive
- Network Connectivity: Providing opportunities for members to share ideas, connect on similar interests and build communities

FOCUS AREAS

The task force will discuss how to:

- Effectively communicate complex economic information to clients
- Help clients understand the rationale for recommendations presented by the advisor
- Help clients plan for their income in retirement
- Advise clients on new investment opportunities, such as cryptocurrency

PRE-WORK/ACTION ITEMS

Prior to our task force meeting, each of you will interview other MDRT members on topics relevant to this task force's objective and share case studies of the situations listed above. This work will provide additional insights for the discussions during our meeting. It will also be shared with the MDRT membership in a variety of formats (such as podcast episodes, videos, blog posts or magazine articles) by MDRT's staff content team. You are also encouraged to submit a unique client strategy, marketing idea or practice management technique that you have used in your practice to improve productivity. Submit to <http://www.imdrt.org/ideas/>.

TASK FORCE LEADERS AND STAFF

Task Force Chair: Bo Jiang
Global Council Member: Rickson Joel Dsouza
Executive Committee Liaison: Peggy Tsai, RFP, CCFP
Staff Liaisons: Pamela Brown, CAE, CMP, Liz DeCarlo

MEMBER RESOURCES BEST PRACTICES DIVISION 3

Discuss and ultimately share with the membership successful strategies members use when working *in* their business (working directly with clients).

MDRT thanks you in advance for your time and contributions. Task forces play an important role in developing content and educating the MDRT membership. MDRT's staff records the ideas shared, determines how to best share with members and sees the ideas through to completion. Contributions and discussions may be used in whole, used in part, modified, distributed or released in accordance with MDRT's Content Strategy.



MDRT

The Premier Association
of Financial Professionals®

BUSINESS DEVELOPMENT TASK FORCE
MEMBER RESOURCES BEST PRACTICES DIVISION 4

OBJECTIVE

Identify best practices and strategies members implement when evolving and developing their business.

STRATEGIC PLATFORMS ADDRESSED

- Transformative Productivity: Enabling members to achieve and surpass their personal and professional goals by capturing, curating and distributing relevant resources to become more productive
- Network Connectivity: Providing opportunities for members to share ideas, connect on similar interests and build communities

FOCUS AREAS

The task force will discuss how to:

- Identify opportunities to evolve a business
- Implement successful strategies for developing a business plan and setting goals (for example, focusing on a niche, identifying and articulating unique value)
- Make the leap from thinking like a salesperson to thinking like a business owner
- Develop a plan for business continuity

PRE-WORK/ACTION ITEMS

Prior to our task force meeting, each of you will interview other MDRT members on topics relevant to this task force's objective and share case studies of the situations listed above. This work will provide additional insights for the discussions during our meeting. It will also be shared with the MDRT membership in a variety of formats (such as podcast episodes, videos, blog posts or magazine articles) by MDRT's staff content team. You are also encouraged to submit a unique client strategy, marketing idea or practice management technique that you have used in your practice to improve productivity. Submit to <http://www.imdrt.org/ideas/>.

TASK FORCE LEADERS AND STAFF

Task Force Chair:	Gregory Fok, CFP
Global Council Member:	Kenichi Ibuki
Executive Committee Liaison:	Peggy Tsai, RFP, CCFP
Staff Liaisons:	Wanda Dixon, Antoinette Tuscano

MEMBER RESOURCES BEST PRACTICES DIVISION 4

Discuss and ultimately share with the membership successful strategies members use when working *in* their business (working directly with clients).

MDRT thanks you in advance for your time and contributions. Task forces play an important role in developing content and educating the MDRT membership. MDRT's staff records the ideas shared, determines how to best share with members and sees the ideas through to completion. Contributions and discussions may be used in whole, used in part, modified, distributed or released in accordance with MDRT's Content Strategy.



MDRT

The Premier Association
of Financial Professionals®

PRACTICE MANAGEMENT TASK FORCE MEMBER RESOURCES BEST PRACTICES DIVISION 4

OBJECTIVE

Identify best practices for advisors to implement in their businesses.

STRATEGIC PLATFORMS ADDRESSED

- Transformative Productivity: Enabling members to achieve and surpass their personal and professional goals by capturing, curating and distributing relevant resources to become more productive
- Network Connectivity: Providing opportunities for members to share ideas, connect on similar interests and build communities

FOCUS AREAS

The task force will discuss:

- Case management, time management, client services record-keeping and other activities associated with business operations
- Business processes and providing better service to clients by using software and technology
- Successful marketing tactics to build your personal brand and differentiate your practice

PRE-WORK/ACTION ITEMS

Prior to our task force meeting, each of you will interview other MDRT members on topics relevant to this task force's objective and share case studies of the situations listed above. This work will provide additional insights for the discussions during our meeting. It will also be shared with the MDRT membership in a variety of formats (such as podcast episodes, videos, blog posts or magazine articles) by MDRT's staff content team. You are also encouraged to submit a unique client strategy, marketing idea or practice management technique that you have used in your practice to improve productivity. Submit to <http://www.imdrt.org/ideas/>.

TASK FORCE LEADERS AND STAFF

Task Force Chair: Hyoun Pio Park
Global Council Member: Kenichi Ibuki
Executive Committee Liaison: Peggy Tsai, RFP, CCFP
Staff Liaisons: Wanda Dixon, Antoinette Tuscano

MEMBER RESOURCES BEST PRACTICES DIVISION 4

Discuss and ultimately share with the membership successful strategies members use when working *in* their business (working directly with clients).

MDRT thanks you in advance for your time and contributions. Task forces play an important role in developing content and educating the MDRT membership. MDRT's staff records the ideas shared, determines how to best share with members and sees the ideas through to completion. Contributions and discussions may be used in whole, used in part, modified, distributed or released in accordance with MDRT's Content Strategy.



MDRT

The Premier Association
of Financial Professionals®

STAFF DEVELOPMENT TASK FORCE
MEMBER RESOURCES BEST PRACTICES DIVISION 4

OBJECTIVE

Identify challenges and solutions related to hiring and managing staff.

STRATEGIC PLATFORMS ADDRESSED

- Transformative Productivity: Enabling members to achieve and surpass their personal and professional goals by capturing, curating and distributing relevant resources to become more productive
- Network Connectivity: Providing opportunities for members to share ideas, connect on similar interests and build communities

FOCUS AREAS

The task force will discuss how to:

- Determine when to hire and what skill sets to look for
- Compensate and engage staff for lasting employment
- Train staff in your business processes
- Develop skills for helping newer producers fulfill their potential

PRE-WORK/ACTION ITEMS

Prior to our task force meeting, each of you will interview other MDRT members on topics relevant to this task force's objective and share case studies of the situations listed above. This work will provide additional insights for the discussions during our meeting. It will also be shared with the MDRT membership in a variety of formats (such as podcast episodes, videos, blog posts or magazine articles) by MDRT's staff content team. You are also encouraged to submit a unique client strategy, marketing idea or practice management technique that you have used in your practice to improve productivity. Submit to <http://www.imdrt.org/ideas/>.

TASK FORCE LEADERS AND STAFF

Task Force Chair: Neeraj Chauhan, CFP, B Comm
Global Council Member: Kenichi Ibuki
Executive Committee Liaison: Peggy Tsai, RFP, CCFP
Staff Liaisons: Wanda Dixon, Antoinette Tuscano

MEMBER RESOURCES BEST PRACTICES DIVISION 4

Discuss and ultimately share with the membership successful strategies members use when working *in* their business (working directly with clients).

MDRT thanks you in advance for your time and contributions. Task forces play an important role in developing content and educating the MDRT membership. MDRT's staff records the ideas shared, determines how to best share with members and sees the ideas through to completion. Contributions and discussions may be used in whole, used in part, modified, distributed or released in accordance with MDRT's Content Strategy.



**TOP OF THE TABLE ANNUAL MEETING
PROGRAM DEVELOPMENT COMMITTEE**
TOP OF THE TABLE DIVISION

OBJECTIVE

Develop the content and speakers for the Top of the Table Annual Meeting. The committee will be divided into two subcommittees – one which will coordinate programming for Main Platform and a second which will coordinate programming for Focus Sessions.

MDRT STRATEGIC PLATFORM ADDRESSED

- Transformative Productivity - Enabling members to achieve and surpass their personal and professional goals by capturing, curating and distributing relevant resources to become more productive.

SPECIFIC ASSIGNMENTS

1. Develop an Annual Meeting program that:
 - Is consistent with MDRT's Strategic Plan
 - Includes topics and speakers that have a global appeal
 - Includes topics and speakers with messages that are transferable to MDRT publications, products, websites, podcasts and blogs
 - Offers programming of interest to the diverse Top of the Table membership
 - Offers cutting-edge programming of advanced topics
 - Reflects current industry issues and anticipates future trends
 - Maintains reasonable balance between member and nonmember speakers
 - Offers transferable ideas that attendees can use after the meeting
 - Provides members who do not attend the meeting with post-meeting access to speaker presentations
2. The Top of the Table Annual Meeting schedule should provide opportunities for members to meet, network and share ideas.
3. This committee will be divided into two subcommittees – one which will coordinate programming for Main Platform and a second which will coordinate programming for Focus Sessions.
 - Pending the results of the entrepreneurial series at the 2019 Top of the Table Annual Meeting, we may look to expand or continue these sessions in 2020.

4. You are encouraged to submit a unique client strategy, marketing idea or practice management technique that you have used in your practice to improve productivity. Submit to <http://www.imdrt.org/ideas/>. MDRT suggests that committees spend time during the committee dinner and meeting sharing submissions.

MDRT MEMBERSHIP

The committee will consist of a Chair and two sub-committees; Main Platform Committee and Focus Sessions Committee. Each sub-committee will consist of an Assistant Chair and four diverse members

COMMITTEE LEADERS AND STAFF

Committee Chair:	Stephen Kagawa, FSS, LUTCF
Global Council Member:	Gregory B. Gagne, ChFC
Division Liaison:	Barbara O'Connor
Staff Liaisons:	Nikki Novak



MDRT

The Premier Association
of Financial Professionals®

**TOP OF THE TABLE
BENCHMARKING COMMITTEE
TOP OF THE TABLE DIVISION**

OBJECTIVE

Partner with a third party to design and implement a benchmarking survey that will enable Top of the Table members to better understand their business by comparing themselves to their Top of the Table peers. Leverage the results to deliver future content and offerings for Top of the Table members.

MDRT STRATEGIC PLATFORM ADDRESSED

- Insights as an Asset – Gather and report unique data from and about members that will be relevant to MDRT, members, external allies and others.
- Future Tense – Develop an informed understanding of emerging market trends to anticipate and meet the unique needs of MDRT members by investing in research and regularly communicating with allies.

FOCUS AREAS

- Develop data points and questions which MDRT should capture on the survey.
- Support efforts to get Top of the Table members to complete the survey.
- Identify opportunities for how MDRT might leverage the survey results to drive more value for members.
- Consider how the benchmarking survey might enhance Court of the Table membership.
- Committee members are encouraged to submit a unique client strategy, marketing idea or practice management technique that you have used in your practice to improve productivity. Submit to <http://www.imdrt.org/ideas/>. MDRT suggests that committees spend time during the committee dinner and meeting sharing submissions.

COMMITTEE LEADERS AND STAFF

Committee Chair:	Simon D. Lister, DipPFS
Global Council Member:	Gregory B. Gagne, ChFC
Division Liaison:	Barbara O'Connor
Staff Liaisons:	Jennifer Schimka

MDRT thanks you in advance for your time and contributions. Committees/task forces play an important role in developing content and educating the MDRT membership. MDRT's staff records the ideas shared, determines how to best share with members and sees the ideas through to completion. Contributions and discussions may be used in whole, used in part, modified, distributed or released in accordance with MDRT's Content Strategy.



MDRT

The Premier Association
of Financial Professionals®

**TOP OF THE TABLE
BUSINESS CONTINUATION COMMITTEE
TOP OF THE TABLE DIVISION**

OBJECTIVE

Develop offerings to provide Top of the Table members with expertise, tools, information, coaching and networking to help with either acquiring another business or being acquired. Create offerings that will continue to deliver value for members in the legacy building and succession planning member segment.

MDRT STRATEGIC PLATFORM ADDRESSED

- Stronger Together – Establish relationships with companies, associations and other external organizations to attract and retain members, add value to key allies and enhance organizational capabilities.
- Network Connectivity – Provide opportunities for members to share ideas, connect on similar interests and build community.

FOCUS AREAS

- Review existing MDRT business continuation content and resources and determine areas where MDRT should develop new tools and resources. Possible areas of focus:
 - Valuation
 - Preparing to acquire or be acquired
 - Identifying a partner
 - Coaching and resources to help with the emotional aspects of leaving a business
- Partner organizations. Identify organizations in the valuation and acquisition space MDRT might partner with to deliver content, resources and expertise to members.
- Competitive analysis. Explore existing offerings in the space and determine opportunities for MDRT to develop offerings.
- Determine how MDRT might connect members who are focused on acquiring or being acquired both at the Top of the Table Annual Meeting and year-round.
- Committee members are encouraged to submit a unique client strategy, marketing idea or practice management technique that you have used in your practice to improve productivity. Submit to <http://www.imdrt.org/ideas/>. MDRT suggests that committees spend time during the committee dinner and meeting sharing submissions.

COMMITTEE LEADERS AND STAFF

Committee Chair: Katy Baxter
Global Council Member: Gregory B. Gagne, ChFC
Division Liaison: Barbara O'Connor
Staff Liaisons: Pamela Brown, CAE, CMP and Katie Keuneke, CAE

MDRT thanks you in advance for your time and contributions. Committees/task forces play an important role in developing content and educating the MDRT membership. MDRT's staff records the ideas shared, determines how to best share with members and sees the ideas through to completion. Contributions and discussions may be used in whole, used in part, modified, distributed or released in accordance with MDRT's Content Strategy.