

# **2014 MDRT Assignments**

# **PDC Division**



The Premier Association of Financial Professionals®

## **PROGRAM DEVELOPMENT COMMITTEE**

*Annual Meeting – Program Development Division*

*Annual Meeting ConneXion Zone, Focus Sessions, Main Platform and Special Sessions*

<b>Chair, Focus Sessions:</b>	<b>Brad J. Myers</b>
<b>Chair, Main Platform/Special Sessions:</b>	<b>Alessandro M. Forte, CertPFS</b>
<b>Chair, ConneXion Zone:</b>	<b>Marc A. Silverman, CLU, ChFC</b>
<b>Divisional Vice President:</b>	<b>Frank William Andreoli, RFC</b>
<b>Executive Committee Liaison:</b>	<b>Caroline A. Banks, APFS</b>
<b>Staff Liaisons:</b>	<b>Raymond Kopcinski, CMP, Barb Schell, Colleen Schneider, Audra Kubilius, and Tony Pittman</b>

### **COMMITTEE RESPONSIBILITY**

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

### **STANDARD ASSIGNMENTS:**

### **GENERAL ASSIGNMENTS:**

1. Read PDC Manual and complete all pre-meeting assignments in advance of July meeting.
2. 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 program formats and technology, e.g. for target audiences, interactive sessions
  - Provides opportunities and, where logistically feasible, provides a place for members to meet, network and share ideas

### **SPECIFIC ASSIGNMENTS:**

1. Main Platform programming shall:
  - Maintain a reasonable balance between member and nonmember speakers
  - Provide speakers that deliver a message with high-quality performance in a limited time frame
  - 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 value of insurance (Insurance Action stories, member speakers)
- Provide speakers in support of the MDRT Foundation Promise Appeal where feasible and/or applicable

2. Special Session programming shall include:

- Pre-meeting programming that delivers additional learning opportunities in an expanded time frame and more interactive workshop format
- Idea Exchanges focused on the spontaneous sharing of knowledge amongst members, facilitated by one or more pre-selected facilitators
- Speakers that can deliver high-quality performance on topics similar to the 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
- Special programming for first-time attendees

3. 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
- 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 web site (MDRT Connect) or *Round the Table* magazine.

4. ConneXion Zone programming shall:

- Provide an alternative learning environment focused on delivering a unique attendee experience
- Allow for members to participate in the environment as speakers by submitting ideas in advance or signing up to speak on-site
- Deliver educational content in short, interactive episodes
- Work with all other PDC sub-committees to identify potential speakers for preview sessions, Q&A sessions, and may not be appropriate in other aspects of the program
- Identify potential ConneXion Zone session topics and speakers
- Explore cutting-edge program formats and technology, e.g., for target audiences, interactive sessions
- Provide opportunities for members to meet, network and share ideas

## **PROGRAM DEVELOPMENT COMMITTEE OPERATIONAL GUIDING PRINCIPLES**

### ***Program Development Committee Operations:***

All Program Development Committee members shall:

- Attend a planning meeting in Chicago in July
- Have the ability to access information to be uploaded and downloaded from specified MDRT websites and to communicate via email
- Adhere to the specific Annual Meeting budget approved by the Finance and Executive Committees

- Submit to the Executive Committee for approval any speakers and topics that do not have the unanimous agreement of the ExCom Liaison, DVP, Chair and Staff Liaison  
Obtain Executive Committee approval for speaker fees that do not have the unanimous agreement of the Executive Committee Liaison, DVP, Chair, and Staff Liaison (Contract negotiation and discussion of fees are to be conducted by MDRT staff only)
- Adhere to target dates for all phases of program development (as appropriate for each sub committee)
- Maintain close cooperation and communication between the PDC and the PGA Committee
- Provide MDRT Marketing and Communication staff with information in a timely manner and as appropriate for development of pre- and post-Annual Meeting promotion and publicity for the insurance, business and financial communities

### ***Programming:***

#### **General:**

- Design the program to encourage participation in all areas by Top of the Table and Court of the Table members
- PDC members will 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, a multilingual attendee base, and utilize innovative, new delivery methods

#### **Main Platform:**

- By policy, certain MDRT traditions are to be included but should not be the primary focus of the Main Platform.
- PDC members are responsible for reviewing Annual Meeting speaker abstracts, manuscripts, and visual materials to assure the sharing of transferable ideas, compliance and legal adherence.
- For the benefit of members, speakers are requested to submit final drafts of their presentation for inclusion in the Annual Meeting Proceedings.

#### **Special Sessions:**

- The goals of the First Time Orientation (FTO) are to provide first-time attendees with information to enhance their Annual Meeting experience and to create a lasting memory and opportunity to network and connect with other MDRT members.
- FTO program positioning, speaker selection preparation and presentation overview are the responsibility of the Program Development Division with onsite logistical support provided by the Annual Meeting PGA Division.
- PDC members are responsible for reviewing Annual Meeting speaker abstracts, manuscripts, visual materials and handouts to assure the sharing of transferable ideas, compliance and legal adherence.
- For the benefit of members, speakers are requested to submit final drafts of their presentation for inclusion in the Annual Meeting Proceedings.

#### **Focus Sessions:**

- Focus Session subject areas should generally fit within the following categories: Protection (product technical information), Boomertirement/Wealth Management, Practice Management, Sales Ideas and Strategies, Marketing, Whole Person, Advanced Top of the Table Programming and Out of the Box..
- Each of the Focus Session categories should have speakers representing at least two countries, where feasible and/or applicable.
- PDC members are responsible for reviewing Annual Meeting speaker abstracts, manuscripts, visual

- materials and handouts to assure the sharing of transferable ideas, compliance, and legal adherence.
- For the benefit of members, speakers are requested to submit final drafts of their presentation for inclusion in the Annual Meeting Proceedings.

**ConneXion Zone:**

- Committee members are responsible for reviewing topic submissions, titles, ideas and content for appropriateness.
- Committee is responsible for identifying “hot topics” that may not be represented in submissions and facilitating a targeted outreach for additional materials.

**Pre-July Planning Meeting**

PDC members will:

- Participate in pre-planning meeting activities, e.g. conference calls, reading assignments
- Submit their Standard Assignments by July 1, in advance of the planning meeting
- Complete assignments received from their Chair prior to attending the July Planning meeting

***During July Planning Meeting***

The following shall take place during the initial planning meeting.

**General Assignments for all teams:**

- Review and discuss general programming policies and procedures, including planning timeline, target and deadline dates
- Provide information to staff for development of Program Draft #1

**Main Platform Team will:**

- Review Main Platform speaker categories and identify initial list of potential speakers to be contacted by staff
- Discuss speaker selection process and establish speaker rating procedures
- Agree on the process of teaming with the Special Sessions team

**Special Sessions Team will:**

- Review Special Session speaker categories and identify initial list of potential speakers to be contacted by staff
- Discuss speaker selection process and establish speaker rating procedures;
- Determine the number of and schedule for Special Sessions
- Agree on the process of teaming with the Main Platform team

**Focus Session Team will:**

- Establish the format for Focus Sessions (i.e., number of sessions, session schedule) within the parameters of the contracted venues
- Identify potential Focus Session topics and speakers
- Review abstract submission and speaker selection procedures

**ConneXion Zone Team will:**

- Identify potential ConneXion Zone Session topics and speakers
- Determine scope of initial call for content (2012 committee reached out to all MDRT Committees for content ideas)
- Review ConneXion Zone speaker applications selection process

***Following July Planning Meeting through Annual Meeting***

- Adhere to timeline to complete all assigned tasks.
- Decide speaker placement to maximize the program experience for members.
- Serve as liaison to assigned speakers:
  - Work with speakers in the development of all requested material
  - Ensure that speakers complete assignments by established deadlines
  - Review submitted speaker materials as required

### ***Post-Annual Meeting***

- Recommend MDRT member speakers who should be invited to join the MDRT Speaker Bureau;
- Complete a post-mortem memo highlighting items and processes that worked well or could use improvement. This information will be shared with the incoming committee to create continuity and growth in the PDC.

### **SCOPE**

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

The Steering Committee is comprised of the:

- Divisional Vice President
- First Vice President, Executive Committee Liaison
- Main Platform Chair and Assistant Chairs
- Special Sessions Chair and Assistant Chair
- Focus Sessions Chair and Assistant Chairs
- ConneXion Zone Chair
- Director, Meeting Services
- Program Manager
- Applicable MDRT Staff

The Steering Committee is scheduled to meet in November. The purpose of the November meeting is to finalize all programming decisions required for the Annual Meeting registration book.

It is expected that as much of the Main Platform and Special Session speakers and events as possible will be finalized at this time. It is expected that all Focus Sessions programming will be finalized by the November meeting. It is expected that all speaker contracting will be completed by December 31, 2012. ConneXion Zone Committee is expected to have session slots finalized and first half of program outlined.

The Annual Meeting Program Development Divisional Vice President should ensure that Annual Meeting programming reflect MDRT's Strategic Plan and provides practical information with good "take home" value, as well as a memorable, remarkable experience.

### **BUDGET**

- 1 The Program Development Division will operate 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 Division consists of a Divisional Vice President; Chair, Main Platform; Chair Special Sessions; Chair, Focus Sessions; Chair, ConneXion Zone; two Assistant Chairs, Main Platform; one Assistant Chair, Special Sessions; two Assistant Chairs, Focus Sessions; ten Focus Session Captains; and three ConneXion Zone Captains. MDRT members selected for these positions should meet the experience requirements established for each position.



# PGA Division



The Premier Association of Financial Professionals®

***Annual Meeting - PGA Division***  
**PGA COMMITTEE**

**Chair, Member Enhancement:** Rino V. Cipparrone, CFP, CLU  
**Chair, Member Logistics:** Todd D. Hruby, LUTCF  
**Chair, Member Services:** Aurora L. Tancock, FLMI, CFP  
**Divisional Vice President:** David R. Wilson, CLU  
**Executive Committee Liaison:** Caroline A. Banks, APFS  
**Staff Liaison(s):** Raymond Kopcinski, CMP, and Anne Dignan, CMP

**COMMITTEE RESPONSIBILITY**

Organize the volunteer support for the general arrangements of the Annual Meeting program.

**STANDARD ASSIGNMENTS**

**SPECIFIC ASSIGNMENTS:**

1. The PGA Committee shall include the following (9) task forces:
  - Entertainment Task Force will provide support to all band activities (e.g., uniforms, equipment, instruments and all other elements that are considered necessary to enhance the MDRT band's performance).
  - First Time Orientation Task Force will welcome first-time attendees and encourage their full participation in Annual Meeting activities. If the program dictates, FTO volunteers ~~and~~ will serve as hosts to the first-timers at the FTO session. FTO programming shall remain the responsibility of the Program Development Committee. The Program Development Committee will select the FTO speaker and moderator. FTO Director and Assistant Directors will maintain an FTO Information Booth Saturday and Sunday of the Annual Meeting.
  - Registration Task Force will greet and assist members and guests attending the Annual Meeting and create an atmosphere of excitement in the registration area.
  - Speaker Relations Task Force(s) will assist speakers appearing in Main Platform sessions and coordinate with the Program Development Committee member responsible for each respective session.
  - The Power Center Store Task Force is responsible for the support of the MDRT Power Center Store and for the sale of MDRT products.
  - The Traffic Task Force(s) (Main Platform, Sessions, and General) will direct and control traffic before, during, and after all assigned sessions and events and assist in maintaining order or other responsibilities as assigned.
  - Meeting Involvement Task Force will recruit additional PGA workers to fill task force vacancies, which develop on-site, maintain a general information booth, and assist members with questions regarding

MDRT and the Annual Meeting. When all vacancies are filled, complete volunteer forms for members interested in volunteering for PGA at the next Annual Meeting.

2. The DVP and Chairs have the responsibility of developing future PGA Leadership as well as for the MDRT organization. Using the “Serve 10 Years Initiative,” the leadership will create potential open positions for new volunteers and use this principle to move volunteers up, over or out as needed on a case-by-case basis.
3. Identify members who have performed well for possible MDRT standing committee appointment.

## **PGA OPERATIONAL GUIDING PRINCIPLES**

### ***Pre-meeting***

1. DVP will submit to the Executive Committee for approval, two nominees, with rationale, for the Chairs, Directors and Assistant Directors positions. The DVP will also create a pool of Qualifying and Qualifying & Life members to fill the positions in the event an invited volunteer declines the invitation.
2. The PGA DVP, Chairs and Directors will have a meeting in the fall.
3. The DVP, Chairs and Directors of Traffic will attend a site visit in the spring to walk the various properties and work out necessary logistical arrangements.
4. The DVP and PGA Chairs will correspond with Directors and Assistant Directors with regard to the specific duties and responsibilities of their task forces. All PGA (leadership and volunteers) are to attend an orientation session, followed by individual task force breakouts, on Saturday afternoon, prior to the start of the Annual Meeting.
5. The Directors of the task forces will be responsible for corresponding with their Assistant Director(s), Task Force Staff Liaison and assigned volunteers. Each Director should be clear on the purpose of their assignment, their respective role and any schedules they should meet. Each Director will coordinate up to two Task Force Telephone Conference Calls with their Chair and Assistant Directors through their MDRT Staff Liaison in late January and early May to review Assistant Director volunteer duties and responsibilities.

### ***On-site***

1. The PGA Division leadership (DVP, Chairs, Directors, and Assistant Directors) will attend the PGA Leadership Meeting on the Friday afternoon preceding the Annual Meeting. NOTE: Any member of the PGA Leadership who cannot attend this meeting should be replaced with an approved alternate, unless that individual has prior approval from the PGA DVP or the Executive Committee Liaison to miss this meeting.
2. The PGA Division leadership (DVP, Chairs, Directors and Assistant Directors) will attend the PGA/PDC dinner the Friday evening preceding the Annual Meeting. NOTE: Any member of the PGA Leadership who cannot attend this function should be replaced with an approved alternate, unless that individual has prior approval from the PGA DVP or the Executive Committee Liaison.
3. All Directors are to meet with their respective Staff Liaisons sometime during the day on Friday or Saturday, prior to the Annual Meeting. They should be clear on their task force breakout agenda and any handout materials needed.
4. The PGA Leadership (DVP, Chairs and Directors) will attend a working breakfast meeting, Saturday–Tuesday mornings during the Annual Meeting, in the designated suite for PGA use.

5. PGA (leadership and volunteers) are specifically invited to attend the Appreciation Reception.
6. The PGA Leadership (DVP, Chairs and Directors) will attend an PGA/PDC Reception on the Wednesday of the Annual Meeting at a specified location.
7. All PGA Leadership will attend a PGA Breakfast on the last morning to recognize and thank the Assistant Directors.
8. The PGA Leadership (DVP, Chairs, Directors, and Assistant Directors) are required to turn in completed evaluations on all individuals assigned to their specific task force prior to the end of the Annual Meeting. The forms are provided by MDRT and should be turned in to the PGA staff liaisons by noon on the last full day of the meeting.

### **BUDGET**

The PGA Division will operate under a budget prepared by the staff liaison in consultation with the Finance Committee and approved by the Executive Committee. The Committee Functions and Operating Procedures apply with regard to expenses are to be followed, 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.

NOTE: A minimum of 75 days lead-time is required for projects designated for Annual Meeting completion.

### **MEMBERSHIP**

The PGA Committee consists of the DVP, three Chairs, nine Directors, approximately 39 Assistant Directors of nine task forces, Executive Committee Liaison, and approximately 800 volunteer members.

# Finance Division



The Premier Association of Financial Professionals®

**FINANCE COMMITTEE**  
*Finance Division*

**Divisional Vice President:** David L. Alarid  
**Executive Committee Liaison:** D. Scott Brennan  
**Staff Liaison(s):** Laura McGrady

**COMMITTEE RESPONSIBILITY**

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

**STANDARD ASSIGNMENTS:**

**SPECIFIC ASSIGNMENTS:**

1. 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.
2. Evaluate the membership dues for the next fiscal year.
3. Evaluate long-range fiscal planning by maintaining and regularly updating the Five Year Financial Projection to help MDRT determine the adequacy of available resources to meet future needs.
4. Review the year-end audit report with the external auditor and make recommendations to the Executive Committee.
5. With investment counsel, review the investment policy statement and portfolio results versus the investment policy statement.

**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 insure continuity one year after the next.

# **MCC 1 Division**



**MDRT**

The Premier Association of Financial Professionals®

**MEMBERSHIP COMMUNICATIONS COMMITTEES (MCCs)**

**Region A – Zones 1, 8 and 13**

**Region B – Zones 2, 3 and 7**

**Region C – Zones 4 and 12**

*Membership Communications Division #1*

**Divisional Vice President:** Bev Carylton, FChFP, CFP  
**Executive Committee Liaison:** Brian D. Heckert, CLU, ChFC ChFC  
Mark J. Hanna, CLU, ChFC

**Staff Liaison(s):**

**COMMITTEE RESPONSIBILITY**

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.

**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.

Zones 1–3, 7 Area and Local Chair nominations must be submitted by **1 May 2013**.

Zone 8 Area and State Chair nominations are due by **1 May 2013**.  
Local Chair nominations are due by **1 July 2013**.

Zone 4, 12–13 Country and Area Chair nominations are due by **1 May 2013**.  
Local Chair nominations are due by **1 July 2013**.

2. By **1 September 2013**, Regional and Zone Chairs together develop a comprehensive plan (with implementation steps) for how to best promote MDRT and improve membership recruitment and retention within the zone.
3. Promote the MDRT Mentoring Program, and encourage members and prospective members to enroll in the program.\*



4. Together with the Country, Area, State and Local Chairs within the zone, organize an MDRT Day in accordance with approved MDRT Guidelines, sales ideas session, workshop and/or networking event within the zone for members and nonmembers in accordance with MDRT procedures. Create a proposed calendar of events for the September 2013– August 2014 organizational year by **1 September 2013**.
  - Submit invitations for Executive Committee visits to the zone.
5. Communicate and promote MDRT's member benefits to members and prospective members in your region/zone.
6. Recommend new methods for how the value of MDRT membership can best be communicated to the members and prospective members in your region/zone.
7. Recommend what new membership programs or services might be developed or what existing programs and services might be enhanced to improve membership recruitment and retention results.
8. Promote the 2014 MDRT Experience meeting in your region/zone.
9. Recommend topics and speakers for MDRT Annual Meeting language-specific sessions (Mandarin, Korean, Japanese, Cantonese, and Spanish). Recommendations will be submitted to Annual Meeting Program Development Committee (PDC) for review and selection. Recommendations for consideration for the 2014 Annual Meeting must be submitted to PDC by 2 July 2013. Recommendations for consideration for the 2014 Annual Meeting must be submitted to the PDC by 1 June 2014.

# **MCC 2 Division**



**MDRT**

The Premier Association of Financial Professionals®

**MEMBERSHIP COMMUNICATIONS COMMITTEES (MCCs)**

**Region D – Zones 5, 6 and 14**

**Region E – Zones 9 and 11**

**Region F – Zones 10 and 15**

*Membership Communications Division #2*

**Divisional Vice President: Sung Ho Shin**

**Executive Committee Liaison: Brian D. Heckert, CLU, ChFC  
Mark J. Hanna, CLU, ChFC**

**Staff Liaison(s):**

**COMMITTEE RESPONSIBILITY**

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.

**STANDARD ASSIGNMENTS:**

**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.

Zones 5–6                      Area and Local Chair nominations must be submitted by **1 May 2013**.

Zone 9–11, 14–15              Country Chair nominations are due by **1 May 2013**.  
Area and Local Chair nominations are due by **1 July 2013**.

2. By **1 September 2013**, Regional and Zone Chairs together develop a comprehensive plan (with implementation steps) for how to best promote MDRT and improve membership recruitment and retention within the zone.
3. Promote the MDRT Mentoring Program and encourage members and prospective members to enroll in the program.\*
4. Together with the Country, Area, State and Local Chairs within the zone, organize an MDRT Day, sales ideas session, workshop and/or networking event within the zone for members and nonmembers in accordance with MDRT procedures. Create a proposed calendar of events for the September 2013–August 2014 organizational year by **1 September 2013**.  
- Submit invitations for Executive Committee visits to the zone.

4. Together with the Country, Area, State and Local Chairs within the zone, organize an MDRT Day in accordance with approved MDRT Guidelines, sales ideas session, workshop and/or networking event within the zone for members and nonmembers in accordance with MDRT procedures. Create a proposed calendar of events for the September 2013– August 2014 organizational year by **1 September 2013**.
  - Submit invitations for Executive Committee visits to the zone.
5. Communicate and promote MDRT's member benefits to members and prospective members in your region/zone.
6. Recommend new methods for how the value of MDRT membership can best be communicated to the members and prospective members in your region/zone.
7. Recommend what new membership programs or services might be developed or what existing programs and services might be enhanced to improve membership recruitment and retention results.
8. Promote the 2014 MDRT Experience meeting in your region/zone.
9. Recommend topics and member speakers for MDRT Annual Meeting language specific sessions (Mandarin, Korean, Japanese, Cantonese, and Spanish). Recommendations will be submitted to Annual Meeting Program Committee for review and selection. Recommendations for consideration for the 2014 Annual Meeting must be submitted to PDC by 2 July 2013. Recommendations for consideration for the 2014 Annual Meeting must be submitted to the PDC by 1 June 2014.

# Experience Division



The Premier Association of Financial Professionals®

**HOST COUNTRY COMMITTEE**  
*2014 MDRT Experience Meeting Division*

**Chair, Host Country Committee:** Mohamad Manmohan Abdullah, ChFC , CLU  
**Divisional Vice President:** Caroline Kheng, ChFC  
**Executive Committee Liaison:** Brian D. Heckert, CLU, ChFC  
**Staff Liaison, Host Country Committee:** Preciosa Farrales and Eryn Carter, CAE

**COMMITTEE RESPONSIBILITY**

Assist with implementing a sponsorship program and securing corporate sponsorship for the MDRT Experience Meeting.\*

*\*May also be responsible for identifying potential exhibitors.*

**SPECIFIC ASSIGNMENTS:**

1. Liaise with MDRT professional staff and the local MCC to identify sponsor targets.
2. Assist with identifying key decision makers within the companies and arranging meetings with senior management.
3. Follow up with companies regarding sponsorship.
4. Accompany the Executive Committee and MDRT professional staff on sponsorship solicitation meetings, as appropriate.
5. Serve as host to sponsor VIPs during the Experience meeting.

**OPERATING GUIDING PRINCIPLES**

- Complete assigned tasks in a timely manner and meets deadlines.
- Have the ability to access information and to communicate via email.
- Have good communication and organizational skills.
- Adhere to the specific MDRT Experience Meeting budget approved by the Finance and Executive Committees.
- Adhere to the sponsorship levels and benefits as established and approved by the Executive Committee.
- Adhere to target dates and requested response dates.
- Prepare a post-mortem memo highlighting items and processes that worked well or could use improvement. This information will be shared with the incoming committee to create continuity and growth in the MDRT Experience Meeting Division.

**BUDGET**

- 1 The MDRT Experience Host Country Committee will operate under the budget prepared in consultation with the Finance Committee and approved by the Executive Committee.
- 2 The registration fee for the meeting is established by the Finance Committee and approved by the Executive

Committee.

- 3 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, economy class fares, etc.
- 4 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 MDRT Experience Host Country Committee consists of a Divisional Vice President; Chair; and two members. The Host Country Committee Chair must be from the country where the Experience meeting will take place.



The Premier Association of Financial Professionals®

**MDRT EXPERIENCE PROGRAM DEVELOPMENT COMMITTEE**  
*2014 MDRT Experience Meeting Division*

**Chair, Program Development:** James M. McEvoy, CLU, AEP  
**Divisional Vice President:** Caroline Kheng, ChFC  
**Executive Committee Liaison:** Brian D. Heckert, CLU, ChFC  
**Staff Liaison, Program Development:** Audra Kubilius, Ray Kopcinski, CMP

**COMMITTEE RESPONSIBILITY**

Develop an Experience 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.

**SPECIFIC ASSIGNMENTS:**

1. Research and suggest potential member and nonmember speakers; review audio, visual and website materials submitted by potential speakers and submit ratings to MDRT.
2. Select speakers. Submit to the Executive Committee for approval any speakers and topics that do not have the unanimous agreement of the Executive Committee Liaison, DVP, Chair and Staff Liaison. Obtain Executive Committee approval for speaker fees that do not have the unanimous agreement of the Executive Committee Liaison, DVP, Chair and Staff Liaison. Speaker invitations, contract negotiations and discussion of fees are to be conducted by MDRT staff only.
3. Work with assigned speakers on the development of their scripts. For non-professional speakers, this may require several phone conversations with review of draft scripts in between. For professional speakers, it will may only involve one phone conversation and follow up as deadlines approach.
4. Provide speakers in support of the MDRT Foundation where feasible and/or applicable.

**OPERATING GUIDING PRINCIPLES**

- Completes assigned tasks in a timely manner and meets deadlines. Can make required time commitment.
- Have the ability to access information and to communicate via email.
- Is comfortable using technology, e.g. email, spreadsheets, YouTube.
- Knowledge of current industry trends, topics and issues relevant to the target audience.
- Knowledge of potential speakers or resources for identifying potential speakers.
- Creativity and flexibility.
- Works well in a team format.
- Has good communication and organizational skills.



- Adhere to the specific MDRT Experience Meeting budget approved by the Finance and Executive Committees.
- Prepare a post-mortem memo highlighting items and processes that worked well or could use improvement. This information will be shared with the incoming committee to create continuity and growth in the MDRT Experience Meeting Committee.

## **SCOPE**

The MDRT Experience Meeting Division Divisional Vice President should ensure that Experience Meeting programming reflects MDRT's Strategic Plan and provides practical information with good "take home" value, as well as a memorable, remarkable experience.

## **BUDGET**

- 1 The MDRT Experience Program Development Committee will operate under the budget prepared in consultation with the Finance Committee and approved by the Executive Committee.
- 2 The registration fee for the meeting is established by the Finance Committee and approved by the Executive Committee.
- 3 The MDRT 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.
- 4 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 MDRT Experience Program Development Committee consists of a Divisional Vice President; Chair; and four members. Either the Chair or one other committee member should be from the host country where the Experience Meeting will take place. And, there should be at least one person from the country of the next Experience Meeting on at least one of the division's committees.



The Premier Association of Financial Professionals®

**MDRT EXPERIENCE MARKETING AND PROMOTION COMMITTEE**  
*2014 MDRT Experience Meeting Division*

**Chair, Marketing and Promotion:** Esra Manurung  
**Divisional Vice President:** Caroline Kheng, ChFC  
**Executive Committee Liaison:** Brian D. Heckert, CLU, ChFC  
**Staff Liaison, Marketing and Promotion:** Lena Kadyrova

**COMMITTEE RESPONSIBILITY**

To assist with the marketing and promotion of the MDRT Experience Meeting.

**GENERAL ASSIGNMENTS:**

1. Identify primary and secondary target audiences, key company contacts and industry representatives.
2. Recommend key messages that would appeal to each of the primary and secondary target audiences.
  - a. Note: The committee can utilize the 2012 and 2013 marketing materials to review messaging, and provide suggested adjustments or new messaging for each audience.
3. Recommend appropriate publications and additional channels to promote the meeting to the target audiences.
4. Partner with the Membership Communications Committee (MCC) to promote the meeting to members, nonmembers, companies and associations.
5. Actively promote the 2014 MDRT Experience meeting by posting a minimum of two (2) messages per month on MDRT's official social media outlets (MDRT Network, Facebook, Twitter or LinkedIn).
  - a. Note: This can also be accomplished through "Liking" or re-posting the official MDRT posts.
6. Identify the dates and locations of industry events where the MDRT Experience meeting can be promoted.
  - a. Note: Attend a minimum of two (2) industry events such as MDRT Days, company conventions, association meetings, etc. to promote the 2014 MDRT Experience meeting to members, nonmembers and companies.

**OPERATING GUIDING PRINCIPLES**

- Complete assigned tasks in a timely manner and meets deadlines.
- Have the ability to access information and to communicate via email.
- Adhere to the specific MDRT Experience Meeting budget approved by the Finance and Executive Committees.
- Adhere to target dates and requested response dates.

- Prepare a post-mortem memo highlighting items and processes that worked well or could use improvement. This information will be shared with the incoming committee to create continuity and growth in the MDRT Experience Meeting Committee.

### **BUDGET**

- 1 The MDRT Experience Marketing and Promotion Committee will operate under the budget prepared in consultation with the Finance Committee and approved by the Executive Committee.
- 2 The registration fee for the meeting is established by the Finance Committee and approved by the Executive Committee.
- 3 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.
- 4 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 MDRT Experience Marketing and Promotion Committee consist of a Divisional Vice President; Chair; and four members.



The Premier Association of Financial Professionals®

**MDRT EXPERIENCE PROGRAM GENERAL ARRANGEMENTS COMMITTEE**  
*2014 MDRT Experience Meeting Division*

**Chair, Program General Arrangements:** Hidenori Miki  
**Divisional Vice President:** Caroline Kheng, ChFC  
**Executive Committee Liaison:** Brian D. Heckert, CLU, ChFC  
**Staff Liaison, Program General Arrangements:** Anne Dignan, CMP and Jody Egel, CMP, CAE

**COMMITTEE RESPONSIBILITY**

To recruit and organize the volunteer support for the on-site logistical general arrangements needs of the MDRT Experience Meeting.

**SPECIFIC ASSIGNMENTS:**

1. Implement a volunteer program to assist with on-site logistical needs in the areas of Traffic, Speaker Relations, Registration, MDRT Store and MDRT Booth.
  - The Traffic Task Force(s) (Main Platform and General) will direct and control traffic before, during, and after all assigned sessions and events and assist in maintaining order or other responsibilities as assigned.
  - Speaker Relations Task Force will assist speakers appearing on Main Platform and coordinate with the respective Program Development Committee liaison.
  - Registration Task Force will greet and assist members, delegates and guests in the registration area who are attending the Experience Meeting.
  - Products and Services Task Force will be responsible for the support of the MDRT Store, the MDRT Booth and other responsibilities as assigned.
2. The Chair and Assistant Chairs will have the responsibility of developing leaders for future PGA Leadership positions as well as for the MDRT organization.
3. Identify members who have performed well for possible MDRT standing committee appointment.

**OPERATING GUIDING PRINCIPLES.**

- Completes assigned tasks in a timely manner and meets deadlines. Can make required time commitment.
- Have the ability to access information and to communicate via email.
- Works well in a team format.
- Has good communication and organizational skills.

- Adhere to the specific MDRT Experience Meeting budget approved by the Finance and Executive Committees.
- Prepare a post-mortem memo highlighting items and processes that worked well or could use improvement. This information will be shared with the incoming committee to create continuity and growth in the MDRT Experience Meeting Committee.

### ***Pre-meeting***

1. The Chair will submit to the DVP nominees to fill the positions of Directors and Assistant Directors.
2. The PGA Committee (Chair and Assistant Chairs) will have one meeting at the location of the meeting.
3. The PGA Chairs and Assistant Chairs will correspond with Directors and Assistant Directors following the proper chain of command with regard to the specific duties and responsibilities of their task forces.
4. The Directors of the task forces will be responsible for corresponding with their Assistant Director(s), Task Force Staff Liaison and assigned volunteers. Each Director should be clear on the purpose of their assignment, their respective role, and any schedules they should meet. Each Director may coordinate one or two Task Force Conference Calls with their Assistant Directors through their MDRT Staff Liaison.

### ***On-site***

1. PGA Leadership Meeting and Tour the afternoon preceding the Meeting: PGA leadership (Chairs, Assistant Chairs, Directors, and Assistant Directors) attend. NOTE: Any member of the PGA Leadership who cannot attend this meeting should be replaced with an approved alternate, unless that individual has prior approval from the Executive Committee. All Directors are to meet with their respective Staff Liaisons at this meeting or sometime during the day prior to the Orientation Session. They should be clear on their task force breakout agenda and any handout materials needed.
2. Executive Committee Dinner the evening preceding the Meeting: PGA Committee (Chair and Assistant Chairs) attend. NOTE: Any member of the PGA Leadership who cannot attend this function should be replaced with an approved alternate, unless that individual has prior approval from the PGA DVP or the Executive Committee Liaison.
3. PGA Orientation Session, followed by individual task force breakouts prior to the start of the meeting: All PGA (leadership and volunteers) attend.
4. VIP Thank You Reception: PGA Leadership (Chair, Assistant Chairs, Directors and Assistant Directors) will be invited.

### **BUDGET**

1. The MDRT Experience Meeting Committee will operate under the budget prepared in consultation with the Finance Committee and approved by the Executive Committee.
2. The registration fee for the meeting is established by the Finance Committee and approved by the Executive Committee.
3. 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.
4. 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 MDRT Experience Meeting Committee consists of a Divisional Vice President; Chair; Chair, Program General Arrangements Committee; and Assistant Chairs.

The make-up of the entire team will include 5 Directors of 5 task forces, approximately 17 Assistant Directors determined by the needs of the venue, and approximately 200 volunteer members. All PGA Leadership shall be Qualifying or Qualifying & Life members, should have PGA experience, and have attended two MDRT meetings in the last six years (one per year). Non-members will be allowed to volunteer on some PGA task forces.

# Membership Division



**MDRT**

The Premier Association of Financial Professionals®

**MEMBERSHIP COMMITTEE**

*Membership Division*

**Chair: Michael P. Austin, CFP**

**Divisional Vice President: Ross Vanderwolf, CFP**

**Executive Committee Liaison: Brian D. Heckert, CLU, ChFC**

**Staff Liaison(s): Kristin Mikrut, Carmen Blume**

**COMMITTEE RESPONSIBILITY**

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. 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.
2. Review the auditing procedure of the income qualification method and refine if necessary.
3. Seek all information necessary to maintain challenging standards for all current and potential MDRT members.
4. Review membership qualification options for first time members in countries where commissions are banned. Make recommendations as to options to accommodate new members in countries with an advisor fee only environment.

**MEMBERSHIP**

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





The Premier Association of Financial Professionals®

**BYLAWS AND ETHICS COMMITTEE**  
*Membership Division*

**Chair:** Peter R. Magni, LUTCF  
**Divisional Vice President:** Ross Vanderwolf, CFP  
**Executive Committee Liaison:** Brian D. Heckert, CLU, ChFC  
**Staff Liaison(s):** Naadia Chaudhry and Laura Good

**COMMITTEE RESPONSIBILITY**

Supervise and monitor qualifications of applicants for membership in Million Dollar Round Table where ethic problems relevant to the applicant have come to the attention of the committee. Establish the eligibility of applicants and members to the 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. Review the ethics positioning of MDRT to its members. Identify opportunities where MDRT, as an organization, can leverage its ethical standards and how can we better communicate them to the membership and industry.
2. Identify, develop and communicate to the membership how members can leverage MDRT's ethical standards when working with their clients. (*Discussion: Determine best medium to use to communicate the message.*)
3. Reinforce membership awareness of the importance of positive ethical behaviors through articles, *Round the Table* magazine, web site or industry publication.
4. Review all inquiries related to ethical charges and complaints. Submit all recommendations for denial to the Executive Committee for final action.
5. Evaluate recommendations by other MDRT committees that would have impact on the *Constitution and Bylaws*.
6. Review the current ethics violations process. Evaluate whether it is a good process in light of our broad global membership with varying laws, regulations and acceptable practices. Consider ways to be informed of the ethical standards in the country in which a case originates. Review the ethics case procedures for potential enhancements.

**MEMBERSHIP**

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



The Premier Association of Financial Professionals®

## **NEXTGEN TASK FORCE**

### ***Membership Division***

**Chair: Kimberly A. Harding, CLU**

**Divisional Vice President: Ross Vanderwolf, CFP**

**Executive Committee Liaison: Brian D. Heckert, CLU, ChFC**

**Staff Liaison(s): Liana Blum and Michael St. John**

### **COMMITTEE RESPONSIBILITY:**

Identify and develop ways to attract young advisors (non-members), 40 years or younger, to join MDRT as new members. Identify and develop ways to retain and engage young advisors who are current members of MDRT.

### **SPECIFIC ASSIGNMENTS:**

1. Identify and implement member-to-member grass roots efforts for recruiting new members. Coordinate these efforts with the appropriate MCC Zones.
2. In addition to current MDRT members (member-to-member) and Companies, identify additional channels for recruiting new members. Develop and recommend marketing approaches for each of these channels.
3. Focusing on young advisors who are members of MDRT, identify and implement strategy and initiative aimed at retaining and engaging these individuals with MDRT “outside” of the MDRT Annual Meeting.

### **MEMBERSHIP**

This committee shall consist of a Chair and diverse membership of members under the age of 45.

# **School of Business Division**



The Premier Association of Financial Professionals®

**SCHOOL OF BUSINESS — PERSONAL DEVELOPMENT TRACK COMMITTEE**  
*School of Business Division*

**Chair:** Charles E. McDaniels, CLU, ChFC  
**Divisional Vice President:** Gregory B. Gagne, ChFC  
**Executive Committee Liaison:** Brian D. Heckert, CLU, ChFC  
**Staff Liaison(s):** Wanda Dixon and Shalini D’Souza

**COMMITTEE RESPONSIBILITY:** This committee is responsible for programming the MDRT School of Business “sessions” on the topics of Whole Person, credentials and designations, presentation and interpersonal skills, study groups, and time management. The School of Business sessions are a combination of webinars, pre-recorded presentations with “quizzes” and possible virtual/live streaming sessions. The School of Business presentations are distributed via MDRT Connect.

**School of Business Vision Statement:** The MDRT School of Business is the leading source of relevant expert information, delivered throughout the year to efficiently grow and manage your financial practice.

**SPECIFIC ASSIGNMENTS:**

**Personal Development:** Build the strongest set of interpersonal skills in order to sustain a strong practice and develop the business and personal communication qualities required of all successful financial professionals and entrepreneurs.

Credentials and designations  
Presentation and interpersonal skills  
Study groups  
Peer-to-peer exchanges  
Time management  
Whole Person

**SPECIFIC ASSIGNMENTS:**

1. Develop programming for the MDRT School of Business, Personal Development track, that:
  - a. Is consistent with MDRT’s Strategic Plan and priorities
  - b. Reflects current industry issues and anticipates future trends
  - c. Offers transferable ideas
  - d. Maintains a reasonable balance between member and nonmember speakers
  - e. Provides speakers who deliver a message with high-quality performance
2. Program (speakers and content) for three webinar/sessions.
  - a. Identify potential topics (within Personal Development track) and speakers
  - b. Final selection of topics and speakers
  - c. Committee members are responsible for working with speaker to develop content, review speaker abstracts, visual materials and handouts to assure the sharing of transferable ideas, compliance and legal adherence
3. Identify a minimum of three past meeting presentations, and develop learning objectives and follow-up quizzes for participants.
4. Review, and update as appropriate, the additional resource as identified by the past School of Business Task Force.
5. Identify content created by other current committees that should be included in the School of Business. (Examples: Whole Person committee, Study Groups committee.)



The Premier Association of Financial Professionals®

## **SCHOOL OF BUSINESS — MARKETING/SALES TRACK COMMITTEE**

### *School of Business Division*

**Chair: Kathleen R. Benjamin, CFP, CPA**

**Divisional Vice President: Gregory B. Gagne, ChFC**

**Executive Committee Liaison: Brian D. Heckert, CLU, ChFC**

**Staff Liaison(s): Jennifer Foos and Tony Pittman**

### **COMMITTEE RESPONSIBILITY**

This committee is responsible for programming the MDRT School of Business “sessions” on the topics of cross-selling, seminars, client events, centers of influence, technology, overcoming client concerns and sales techniques. The sessions are a combination of webinars, pre-recorded presentations with “quizzes” and possible virtual/live streaming sessions. The School of Business presentations are distributed via MDRT Connect.

**School of Business Vision Statement:** The MDRT School of Business is the leading source of relevant expert information, delivered throughout the year to efficiently grow and manage your financial practice.

**Marketing/Sales: Leverage the depths of our members’ experience and knowledge to build the most professional financial advisors.**

#### **Marketing**

Cross-selling  
Seminars  
Client events  
Centers of influence  
Technology

#### **Sales**

Overcoming client objections  
Sales techniques

### **SPECIFIC ASSIGNMENTS:**

1. Develop programming for the MDRT School of Business, Marketing/Sales track, that:
  - a. Is consistent with MDRT’s Strategic Plan and priorities
  - b. Reflects current industry issues and anticipates future trends
  - c. Offers transferable ideas
  - d. Maintains a reasonable balance between member and nonmember speakers
  - e. Provides speakers who deliver messages with high-quality performance
2. Program (speakers and content) for three webinar/sessions.
  - a. Identify potential topics (within Marketing/Sales track) and speakers
  - b. Final selection of topics and speakers
  - c. Committee members are responsible for working with speaker to develop content, review speaker abstracts, visual materials and handouts to assure the sharing of transferable ideas, compliance and legal adherence
3. Identify a minimum of three past meeting presentations, and develop learning objectives and follow-up quizzes for participants.
4. Review, and update as appropriate, the additional resource as identified by the past School of Business Task Force.
5. Identify content created by other current committees that should be included in the School of Business. (Examples: Marketing and Branding committees, Technology committee.)



The Premier Association of Financial Professionals®

**SCHOOL OF BUSINESS — PRACTICE MANAGEMENT TRACK COMMITTEE**  
*School of Business Division*

**Chair:** Steven A. Plewes, CLU, ChFC  
**Divisional Vice President:** Gregory B. Gagne, ChFC  
**Executive Committee Liaison:** Brian D. Heckert, CLU, ChFC  
**Staff Liaison(s):** Pamela Brown, CMP, CAE, Audra Kubilius, and Jim Unander

**COMMITTEE RESPONSIBILITY:** This committee is responsible for programming the MDRT School of Business “sessions” on the topics of technology, hiring and developing staff, branding, client segmentation, compensation structure within a practice, benchmarking, and creating a business plan. The School of Business sessions are a combination of webinars, pre-recorded presentations with “quizzes” and possible virtual/live streaming sessions. The School of Business presentations are distributed via MDRT Connect.

**School of Business Vision Statement:** The MDRT School of Business is the leading source of relevant expert information, delivered throughout the year to efficiently grow and manage your financial practice.

**SPECIFIC ASSIGNMENTS:**

**Practice Management:** Provide effective knowledge tools to efficiently meet daily and long-term business needs.

Technology  
Hiring staff and development  
Branding  
Client segmentation  
Compensation structure  
Benchmarking  
Business plans

**SPECIFIC ASSIGNMENTS:**

1. Develop programming for the MDRT School of Business, Practice Management track, that:
  - a. Is consistent with MDRT’s Strategic Plan and priorities
  - b. Reflects current industry issues and anticipates future trends
  - c. Offers transferable ideas
  - d. Maintains a reasonable balance between member and nonmember speakers
  - e. Provides speakers that deliver a message with high-quality performance
2. Program (speakers and content) for three webinar/sessions.
  - a. Identify potential topics (within Practice Management track) and speakers
  - b. Final selection of topics and speakers
  - c. Committee members are responsible for working with speakers to develop content, review speaker abstracts, visual materials and handouts to assure the sharing of transferable ideas, compliance and legal adherence
3. Identify a minimum of three past meeting presentations, and develop learning objectives and follow-up quizzes for participants.
4. Review, and update as appropriate, the additional resource as identified by the past School of Business Task Force.
5. Identify content created by other current committees that should be included in the School of Business. (Examples: Technology committee, Staff Operations committee, Branding and Marketing Committees, Fee-Based Practice committee, Business Plan committee.)



The Premier Association of Financial Professionals®

**SCHOOL OF BUSINESS — SUCCESSION/EXIT STRATEGIES TRACK COMMITTEE**  
*School of Business Division*

**Chair: Sarah J. Kaelberer, CFP, ChFC**

**Divisional Vice President: Gregory B. Gagne, ChFC**

**Executive Committee Liaison: Brian D. Heckert, CLU, ChFC**

**Staff Liaison(s): Jennifer Foos, Jenni Witkov and Diane Walgurski**

**COMMITTEE RESPONSIBILITY:** This committee is responsible for programming the MDRT School of Business “sessions” on the topics of business continuation, business expansion, selling your business, mentoring, business valuation, and practice management. The School of Business sessions are a combination of webinars, pre-recorded presentations with “quizzes” and possible virtual/live streaming sessions. The School of Business presentations are distributed via MDRT Connect.

**School of Business Vision Statement:** The MDRT School of Business is the leading source of relevant expert information, delivered throughout the year to efficiently grow and manage your financial practice.

**Succession/Exit Strategies:** Provide methods to customize a business model for your practice succession.

Business continuation  
Business expansion  
Selling your business  
Mentoring  
Business valuation  
Practice management

**SPECIFIC ASSIGNMENTS:**

1. Develop programming for the MDRT School of Business, Succession/Exit Strategies track, that:
  - a. Is consistent with MDRT’s Strategic Plan and priorities
  - b. Reflects current industry issues and anticipates future trends
  - c. Offers transferable ideas
  - d. Maintains a reasonable balance between member and nonmember speakers
  - e. Provides speakers who deliver a message with high-quality performance
2. Program (speakers and content) for three webinar/sessions.
  - a. Identify potential topics (within Succession/Exit Strategies track) and speakers
  - b. Final selection of topics and speakers
  - c. Committee members are responsible for working with speakers to develop content, review speaker abstracts, visual materials and handouts to assure the sharing of transferable ideas, compliance and legal adherence
3. Identify a minimum of three past meeting presentations, and develop learning objectives and follow-up quizzes for participants.
4. Review, and update as appropriate, the additional resource as identified by the past School of Business Task Force.
5. Identify content created by other current committees that should be included in the School of Business. (Examples: Mentoring committees, Fee-Based Practices committee.)

# Productivity Division





The Premier Association of Financial Professionals®

## ADVISOR BRANDING & MARKETING COMMITTEE

### *Productivity Division*

<b>Chair:</b>	<b>Subrata Saha</b>
<b>Divisional Vice President:</b>	<b>Jiro Kato, CFP</b>
<b>Executive Committee Liaison:</b>	<b>Mark J. Hanna, CLU, ChFC</b>
<b>Staff Liaison(s):</b>	<b>Wanda Dixon and Pamela Brown, CMP, CAE</b>

**COMMITTEE RESPONSIBILITY:** Responsible for identifying successful marketing/branding techniques that members use in their practices. Topics include; cross-selling, referrals, branding, centers of influence, point of sale presentation techniques, use of social media and client segmentation.

### **SPECIFIC ASSIGNMENTS:**

1. Pre-Meeting Assignment #1: Interview a minimum of three MDRT members to find out what marketing or branding strategies they successfully use in their business. Be prepared to share the results of your interviews during the meeting.
2. Pre-Meeting Assignment #2: Evaluate the past year's issues of *Round the Table* magazine for general content and graphic appeal. Come to the meeting prepared with feedback and suggestions for improvement. During the next year, committee members will receive and complete an evaluation form to return to the *Round the Table* editor. Each member is to review the magazine, complete the evaluation form and send it to the *Round the Table* editor.
3. Identify successful marketing/branding techniques used by MDRT members.
  - Identify how branding is incorporated into member websites. Create an article on how to build a more effective website.
  - Create a how-to" article on marketing/branding a practice.
4. Each committee member is to submit a minimum of three marketing/branding ideas for publication. *NOTE: These may be ideas as a result of Specific Assignment #1 and/or taken from past Annual Meeting "Proceedings" presentations*
5. Discuss how each committee member acquires referrals. Develop a minimum of two resources (articles, Web resources, etc.) on this topic.
6. Identify how members are successfully integrating social media (Facebook, LinkedIn, etc.) into their branding and marketing strategies. Develop a minimum of two action items (articles, Web resources, etc.) addressing this topic.
7. On a monthly basis, the committee is to either initiate or respond to MDRT Network discussions on the topic of marketing and/or branding.

8. Suggest names of members to feature in the “Markets” section of *Round the Table*. This section focuses on members who have found success working with a target market.
9. Review and expand marketing techniques for the Marketing 101 primer on [www.mdr.org](http://www.mdr.org)
10. Review past MDRT “Proceedings” presentations related to the topics of marketing and branding. Identify and assign keywords and search terms for each presentation.

#### **MEMBERSHIP**

This committee shall consist of a Chair and diverse membership from Division’s region.



The Premier Association of Financial Professionals®

## **AGENCY DEVELOPMENT COMMITTEE**

### *Productivity Division*

**Chair:** Patric Leung Wai Ming, CFP, FCHFP  
**Divisional Vice President:** Jiro Kato, CFP  
**Executive Committee Liaison:** Mark J. Hanna, CLU, ChFC  
**Staff Liaison(s):** Wanda Dixon and Pamela Brown, CMP, CAE

**COMMITTEE RESPONSIBILITY:** This committee creates resources for members to use when building a sales team, training agents and managing a team. This should include characteristics of successful sales teams, best practices of successful managers and productivity tips for motivating a sales team.

### **SPECIFIC ASSIGNMENTS:**

1. Pre-Meeting Assignment: Interview successful sales managers.
2. Identify and interview MDRT members who are also successful sales managers. Submit “Member Profile” article for possible publication in *Round the Table* magazine. The article should explain how the member balances his or her management responsibilities with meeting personal production to qualify for MDRT.
3. Identify key characteristics of successful managers in the areas of:
  - a. Goal setting
  - b. Performance appraisals
  - c. Leading and motivating
  - d. Sales coaching/techniques
  - e. Training and development
  - f. Managing expectations

Create an online resource to address key characteristics and best practices of successful sales managers.

4. Identify common mistakes made by sales managers and how to avoid them. Write an article to include in the online resource.
5. Brainstorm and create a list of successful techniques for motivating a sales team. Write an article on best practices for motivating a sales team.
6. Identify different sales management styles and share how they affect the producer. Identify successful tactics producers can embrace to successfully work with these styles.
7. Develop a minimum of two case studies that focus on developing an advisor who is struggling with his or her sales performance. What steps did they take to improve their performance? Who were the key players? What were the obstacles? How did the manager celebrate success?
8. Establish a group on the MDRT Network for members who are also sales managers. The committee members are to initiate and participate in the group’s discussions.

### **MEMBERSHIP**

This committee consists of a Chair and diverse membership from the Asia region.



The Premier Association of Financial Professionals®

## **MENTORING COMMITTEE**

### *Productivity Division*

**Chair: Niti Sharma, LUTCF**

**Divisional Vice President: Jiro Kato, CFP**

**Executive Committee Liaison: Mark J. Hanna, CLU, ChFC**

**Staff Liaison(s): Wanda Dixon and Pamela Brown, CMP, CAE**

**COMMITTEE RESPONSIBILITY:** Produce mentoring tools and performance-enhancement techniques transferrable to Million Dollar Round Table production standards, which can be used by all MDRT member countries.

*NOTE: Each of the regional committees is encouraged to meet the need of members from their region, thus giving permission to create region-and language-specific content.*

### **SPECIFIC ASSIGNMENTS:**

1. Pre-Meeting Assignment: Interview mentoring teams and submit a summary of interviews prior to the committee meeting.
2. The committee is responsible developing the “Monthly Mentoring Feature” to include presentation highlights and key study questions. The committee is to develop a minimum of six monthly features. Review previous features on [www.mdrtd.org/Membersthip/About Mentoring](http://www.mdrtd.org/Membersthip/AboutMentoring).
  - Identify and select an Annual Meeting “Proceedings” presentation from 2002–2012 related to a mentoring topic.
  - Provide a statement that highlights the proceedings topic, and create four to five study questions for mentoring participants.
3. The committee is responsible for developing content for each issue of the bimonthly Mentoring e-Newsletter.
  - *For example, create an article on a success story of a recent aspirant who became an MDRT member, checklists for mentors, webinars on how to become a mentor, develop a puzzle or trivia on mentoring, create quotes, articles on informal mentoring relationships, articles on overcoming obstacles, articles on study groups or networking, etc.*
4. Create a mentor/aspirant profile to be distributed in each issue of the Mentoring e-Newsletter. Using the results of Specific Assignment #1, profile successful mentoring teams.
5. Identify challenges, roadblocks, and barriers that negatively affect mentoring teams and how to avoid and/or address them. Create a series of articles for the e-newsletter addressing the challenges.
6. Establish a group on the MDRT Network for mentors. The committee members are to begin and participate in the group’s discussions. Committee members should initiate a minimum of one discussion each month.
7. Review past MDRT “Proceedings” presentations related to topic of mentoring. Identify and assign keywords and search terms for each presentation.

### **MEMBERSHIP**

This committee shall consist of a Chair and diverse membership to include current MDRT mentors and MDRT members who were an aspirant in the mentoring program prior to their membership from the Division’s region.

# Best Practices Division



The Premier Association of Financial Professionals®

## **CLIENTS FOR LIFE COMMITTEE**

### ***Best Practices Division***

**Chair: Pecky Wong So Ping, FChFP, MBA**

**Divisional Vice President: Seung Hyun Won**

**Executive Committee Liaison: Mark J. Hanna, CLU, ChFC**

**Staff Liaison(s): Wanda Dixon and Pamela Brown, CMP, CAE**

**COMMITTEE RESPONSIBILITY:** This committee creates resources for members to use when working with life insurance clients. The committee focuses on topics such as bereavement issues, working with spouses/beneficiaries, when to contact client's survivors and what to say, how to best advise terminally ill clients, etc.

### **SPECIFIC ASSIGNMENTS:**

1. Develop a Web resource for MDRT members focused on the life insurance market. The resource should include, but not be limited to, the following sections:
  - a. Developing and maintaining solid relationships with your life clients and their beneficiaries
  - b. Best practices for handling a life insurance claim
  - c. "How-to" approaches for working with terminally ill clients
  - d. Identifying resources to benefit the survivors
2. Develop a "how-to" best practices guide for developing relationships with the client's family (spouse/beneficiary).
3. Identify approaches for advising clients on purchasing life insurance when working with various market segments, i.e. Generation Y, the retirement market, business market, etc. Develop a minimum of two resources (articles, Web resources, etc.).
4. Each issue of *Round the Table* magazine includes a "True Tales" article explaining how an MDRT member protected a client from financial ruin. Submit a "True Tales" article for *Round the Table* magazine or suggest possible members with a "True Tales" story. (Minimum of three articles to be submitted by committee.)
5. Review past MDRT "Proceedings" presentations related to the topic of life insurance. Identify and assign keywords, and search terms for each presentation.

### **MEMBERSHIP**

This committee consists of a Chair and diverse membership. Committee members are made up of members from Asia, with some representation from the Oceania/Europe/North America regions. This committee meets in Asia.



The Premier Association of Financial Professionals®

## **WHOLE PERSON COMMITTEE**

### ***Best Practices Division***

**Chair: Cheol Ung Kim**

**Divisional Vice President: Seung Hyun Won**

**Executive Committee Liaison: Mark J. Hanna, CLU, ChFC**

**Staff Liaison(s): Wanda Dixon and Pamela Brown, CMP, CAE**

**COMMITTEE RESPONSIBILITY:** This committee identifies and creates resources for MDRT members that address the seven elements of the Whole Person concept.

Create and develop content for MDRT communications channels (MDRT-produced products, website, *Round the Table*, webinars, MDRTV, MDRT Network, blogs, podcasts, etc.).

### **SPECIFIC ASSIGNMENTS:**

1. Review current Whole Person content on [www.mdrtd.org](http://www.mdrtd.org). Develop additional content addressing each of the seven Whole Person elements.
2. Each issue of *Round the Table* magazine includes a “True Tales” article of how an MDRT member protected a client from financial ruin. Submit a “True Tales” article for *Round the Table* magazine or suggest possible members with a “True Tales” story. (Minimum of three articles to be submitted by committee.)
3. Each issue of *Round the Table* magazine includes profiles of MDRT member role models. The committee is to submit “member profile” articles for possible publication. The articles should explain how the member does business, keeps work and life balance, and should offer readers how-to advice. (Minimum of three articles to be submitted by committee.)
4. Review the seven elements of the Whole Person Concept; identify member(s) who have successfully embraced one or more of the elements (family, health, education, career, service, financial and spiritual). Create an article describing how the member embraces and maintains the experience for that element. (Submit a minimum of three articles.)
5. Join the Whole Person group on the MDRT Network. On minimum monthly basis, committee members are to begin discussions and respond to posts.
6. Review past MDRT “Proceedings” presentations related to the topic of Whole Person. Identify and assign keywords and search terms for each presentation or article.

### **MEMBERSHIP**

This committee consists of a Chair and diverse membership. Committee members are made up of members from Asia, with some representation from the Oceania/Europe/North America regions. This committee meets in Asia.



The Premier Association of Financial Professionals®

## **STUDY GROUPS COMMITTEE**

### ***Best Practices Division***

**Chair: John L. Thomas, CLU, MSFS**

**Divisional Vice President: Seung Hyun Won**

**Executive Committee Liaison: Mark J. Hanna, CLU, ChFC**

**Staff Liaison(s): Wanda Dixon and Pamela Brown, CMP, CAE**

**COMMITTEE RESPONSIBILITY:** Develop a primer for a website that addresses “how-tos” for study groups. Interview members of successful study groups (how to organize, how often to meet, what happens during meetings, how is the agenda developed, etc.).

### **SPECIFIC ASSIGNMENTS:**

1. Pre-Meeting Assignment: Identify and interview producers who participate in a study group. Come to the meeting prepared to share your findings.
2. Based on Specific Assignment #1, create a minimum of three articles on MDRT study groups.
3. Create a Web-based resource/white paper on best practices for study groups. The resource should address topics of interest to members who want to start a study group as well as be a resource for existing study groups. It should include, but is not limited to, the following sections:
  - a. What is a study group?
  - b. Benefits of participating in a study group
  - c. Characteristics of successful study groups
  - d. “How to”:
    - i. Establish/start a study group
    - ii. Rules
    - iii. Frequency of meetings
    - iv. Meeting agendas
  - e. Possible pitfalls and how to avoid them
4. Begin a group(s) on the MDRT Network to encourage formation of study groups and share best practices of successful study groups. On a minimum monthly basis, committee members are to begin discussions and respond to posts.
5. Review past MDRT “Proceedings” and *Round the Table* articles related to the topic of study groups. Identify and assign keywords and search terms for each presentation or article.

### **MEMBERSHIP**

This committee consists of a Chair and diverse membership. Committee members are made up of members from Asia, with some representation from the Oceania/Europe/North America regions. This committee meets in Asia.



# Business Principles Division



**MDRT**

The Premier Association of Financial Professionals®

**U.S. TAX PLANNING COMMITTEE**

***Business Principles Division***

**Chair:** Michael L. Weintraub, CLU  
**Divisional Vice President:** JoAnn E. Favia, CLU, ChFC  
**Executive Committee Liaison:** Mark J. Hanna, CLU, ChFC  
**Staff Liaison(s):** Jennifer Foes and Abby Puchner

**COMMITTEE RESPONSIBILITY:** This committee explores how members are addressing the recent changes and potential changes to U.S. tax law. How does it impact the plans and strategies you have implemented for/with clients?

Create, identify and develop high-level content for MDRT communications channels (MDRT-produced products, website, *Round the Table*, webinars, MDRTV, MDRT Network, blogs, podcasts, etc.).

**SPECIFIC ASSIGNMENTS:**

1. Create and/or identify existing content (case studies, webinars, MDRT Talk segments, strategy briefs, outside content, etc.) to share with U.S. membership that is specific to the impact of the U.S. tax law changes, and address how to respond to the changes when developing/implementing client strategies for various markets (estate planning, retirement planning, etc.).
2. Develop a minimum of five resources (articles, Web resources, etc.) on this topic.
3. Establish a group on the MDRT Network for members on this topic. The committee members are to initiate and participate in group discussions.

**MEMBERSHIP**

This committee consists of a Chair and a diverse membership from the United States.



The Premier Association of Financial Professionals®

## **BEST PRACTICES FOR FEE-BASED PRACTICES COMMITTEE**

### *Business Principles Division*

**Chair: Susan Catherine Paterson**

**Divisional Vice President: JoAnn E. Favia, CLU, ChFC**

**Executive Committee Liaison: Mark J. Hanna, CLU, ChFC**

**Staff Liaison(s): Kathryn Keuneke and Don Noverini**

**COMMITTEE RESPONSIBILITY:** This committee examines how members transitioned to or added fee-based revenue to their practices, and identifies best practices for running a fee-based practice.

### **SPECIFIC ASSIGNMENTS:**

*For each of the following assignments, create resources, articles, Web resources, MDRT Talk segments, webinars, etc.*

1. What changes have you made to your practice as result of increased regulatory environment?
  - a. What changes, if any, have you implemented in your office (staff and office procedures or ways of being compensated) as a result of increased regulatory and compliance environment?
  - b. What changes to your interaction with prospects and clients have been implemented?
2. What advice would you give to members in countries that are beginning to implement higher levels of regulations and compliance? What are common “pitfalls” and ways to avoid them?
3. Create a checklist of best practices for producers operating in a highly regulated environment.
4. Identify the advantages of fee-based practice.
5. Identify various models for fee-based practice to include approaches to structuring fees.
6. What are common objections from clients regarding a fee-based model, and how do you respond to these?
7. Establish a group on the MDRT Network for members on this topic. The committee members are to initiate and participate in the group discussions.
8. Review past MDRT “Proceedings” presentations related to the topic of compliance and fee-based practices. Identify and assign keywords and search terms for each presentation.

### **MEMBERSHIP**

This committee consists of a Chair and a diverse membership. Committee members are made up of members primarily from the United Kingdom, Australia and the United States.



The Premier Association of Financial Professionals®

## **MENTORING COMMITTEE**

### ***Business Principles Division***

**Chair: Dorin Roxana Israelian**

**Divisional Vice President: JoAnn E. Favia, CLU, ChFC**

**Executive Committee Liaison: Mark J. Hanna, CLU, ChFC**

**Staff Liaison(s): Wanda Dixon and Debra Martin**

**COMMITTEE RESPONSIBILITY:** This committee produces mentoring tools and performance-enhancement techniques transferrable to Million Dollar Round Table production standards, which can be used by all MDRT member countries.

*NOTE: Each regional committee is encouraged to meet the needs of members from their region, thus giving them permission to create region- and language-specific content.*

### **SPECIFIC ASSIGNMENTS:**

1. Pre-Meeting Assignment: Interview mentoring teams and submit a summary of interviews prior to the committee meeting.
2. The committee is responsible developing the “Monthly Mentoring Feature” to include presentation highlights and key study questions. The committee is to develop a minimum of six monthly features. Review previous features on [www.mdrt.org/MemberShip/About Mentoring](http://www.mdrt.org/MemberShip/AboutMentoring).
  - Identify and select an Annual Meeting “Proceedings” presentation from 2002–2012 related to a mentoring topic.
  - Provide a statement that highlights the proceedings topic, and create four to five study questions for mentoring participants.
3. The committee is responsible for developing content for each issue of the bimonthly Mentoring e-Newsletter.
  - *For example, create an article on a success story of a recent aspirant who became an MDRT member, checklists for mentors, webinars on how to become a mentor, develop a puzzle or trivia on mentoring, create quotes, articles on informal mentoring relationships, articles on overcoming obstacles, articles on study groups or networking, etc.*
4. Create a mentor/aspirant profile to be distributed in each issue of the Mentoring e-Newsletter. Using the results of Specific Assignment #1, profile successful mentoring teams.
5. Identify challenges, roadblocks, and barriers that negatively affect mentoring teams and how to avoid and/or address them. Create a series of articles for the e-newsletter addressing the challenges.
6. Establish a group on the MDRT Network for mentors. The committee members are to begin and participate in the group’s discussions. Committee members should initiate a minimum of one discussion each month.
7. Review past MDRT “Proceedings” presentations related to topic of mentoring. Identify and assign keywords and search terms for each presentation.

### **MEMBERSHIP**

This committee consists of a Chair and diverse membership that includes current MDRT mentors and MDRT members who were aspirants in the mentoring program prior to their membership from the Division’s region.



The Premier Association of Financial Professionals®

## **ADVISOR BRANDING & MARKETING COMMITTEE**

### ***Business Principles Division***

**Chair: Jennifer P. Mann, MBA, CLU**

**Divisional Vice President: JoAnn E. Favia, CLU, ChFC**

**Executive Committee Liaison: Mark J. Hanna, CLU, ChFC**

**Staff Liaison(s): Jennifer Foos and Don Noverini**

**COMMITTEE RESPONSIBILITY:** This committee is responsible for identifying successful marketing/branding techniques that members use in their practices. Topics include: cross-selling, referrals, branding, centers of influence, point of sale presentation techniques, use of social media and client segmentation.

### **SPECIFIC ASSIGNMENTS:**

1. Pre-Meeting Assignment #1: Interview a minimum of three MDRT members to find out what marketing or branding strategies they successfully use in their business. Be prepared to share the results of your interviews during the meeting.
2. Pre-Meeting Assignment #2: Evaluate the past year's issues of *Round the Table* magazine for general content and graphic appeal. Come to the meeting prepared with feedback and suggestions for improvement. During the next year, committee members will receive and complete an evaluation form to return to the *Round the Table* editor. Each member is to review the magazine, complete the evaluation form and send it to the *Round the Table* editor.
3. Identify successful marketing/branding techniques used by MDRT members.
  - Identify how branding is incorporated into member websites. Create an article on how to build a more effective website.
  - Create a how-to" article on marketing/branding a practice.
4. Each committee member is to submit a minimum of three marketing/branding ideas for publication. *NOTE: These may be ideas as a result of Specific Assignment #1 and/or taken from past Annual Meeting "Proceedings" presentations*
5. Discuss how each committee member acquires referrals. Develop a minimum of two resources (articles, Web resources, etc.) on this topic.
6. Identify how members are successfully integrating social media (Facebook, LinkedIn, etc.) into their branding and marketing strategies. Develop a minimum of two action items (articles, Web resources, etc.) addressing this topic.

7. On a monthly basis, the committee is to either initiate or respond to MDRT Network discussions on the topic of marketing and/or branding.
8. Suggest names of members to feature in the “Markets” section of *Round the Table*. This section focuses on members who have found success working with a target market.
9. Review and expand marketing techniques for the Marketing 101 primer on [www.mdr.org](http://www.mdr.org)
10. Review past MDRT “Proceedings” presentations related to the topics of marketing and branding. Identify and assign keywords and search terms for each presentation.

## **MEMBERSHIP**

This committee consists of a Chair and diverse membership from the Division’s region.

# Business Development Division



The Premier Association of Financial Professionals®

## **BUSINESS MODEL/BUSINESS PLAN COMMITTEE**

### *Business Development Division*

**Chair: Hamilton P.B. Poynor, CLU, AEP**

**Divisional Vice President: Daniel M. Boardman, CLU, CFP**

**Executive Committee Liaison: Mark J. Hanna, CLU, ChFC**

**Staff Liaison(s): Patricia Pereya, Scott Rogers and Jennifer Schmika**

**COMMITTEE RESPONSIBILITY:** This committee develops tools and resources for members that address how to develop a business plan.

### **SPECIFIC ASSIGNMENTS:**

1. Pre-Meeting Assignment: Each committee member is assigned existing MDRT resources on this topic to review in preparation for the committee meeting.
2. Pre-Meeting Assignment: Identify and talk to MDRT members who have developed a strong business plan. (Each member will share their discussions at the committee meeting.)
  - What facilitated the need to create and implement a business plan?
  - Share the real-life experiences — including success stories and challenges.
3. Pre-Meeting Assignment: Bring a sample business plan to share and discuss.

*Using the information gathered when addressing Specific Assignments #1 and 2, create resources: articles, Web resources, MDRT talk segments, etc., addressing the following assignments:*

4. Identify the benefits of developing and implementing a business plan.
5. What are the key elements of a business plan?
6. Create a checklist on how to start a business plan.
7. Identify the roadblocks of creating a business plan and how to overcome them.
8. Identify the key players for developing/implementing a business plan and their role(s).
9. Develop a list of resources that may be of value to members when developing a business plan.
10. Review past MDRT “Proceedings” presentations related to the topic of creating a business plan.  
Identify keywords and search terms for each presentation.

### **MEMBERSHIP**

This committee consists of a Chair and diverse membership. Committee members are made up of members from mature markets, primarily from the United States, the United Kingdom, Australia and Canada.





The Premier Association of Financial Professionals®

## **PRE- & POST-RETIREMENT COMMITTEE**

### *Business Development Division*

**Chair:** William T. Spencer, CFP  
**Divisional Vice President:** Daniel M. Boardman, CLU, CFP  
**Executive Committee Liaison:** Mark J. Hanna, CLU, ChFC  
**Staff Liaison(s):** Jennifer Foos and Abby Puchner

**COMMITTEE RESPONSIBILITY:** This committee develops content, tools and resources for members to use when working with clients in the pre- and post-retirement markets.

### **SPECIFIC ASSIGNMENTS:**

*For each of the following assignments, create articles, Web resources, MDRT talk segments, etc.*

1. Identify some best practice approaches for an advisor to take when working with prospects or clients who are approaching or in retirement.
  - a) Prospecting
  - b) Services offered
2. Identify the concerns advisors hear from pre-retirement prospects and clients and best practices for how advisors address these concerns.
3. Identify tools that may be useful in working with clients near or in retirement. (Examples: retirement planning programs, visual aids, client reports, newsletters, etc.)
4. Examine compliance concerns and how agents are dealing with them. (Examples: identifying legal capacity in an elderly client, utilization of luncheon, dinner seminars for seniors, suitability for annuity sales and replacements.)
5. Create a minimum of three resources (articles, Web resources, MDRT talk segments, etc.) for publication.
6. Review past “Proceedings” presentations related to this topic; identify keywords and search terms.

### **MEMBERSHIP**

This committee consists of a Chair and diverse membership. Committee members are made up of members from United States and Canada, with some representation from the Asia/Oceania/Europe regions. This committee meets at MDRT Headquarters.



The Premier Association of Financial Professionals®

## **TECHNOLOGY COMMITTEE**

### ***Business Development Division***

**Chair:** Edward C. Skelly, CLU, ChFC  
**Divisional Vice President:** Daniel M. Boardman, CLU, CFP  
**Executive Committee Liaison:** Mark J. Hanna, CLU, ChFC  
**Staff Liaison(s):** Jennifer Foos, Wayne Schmeiser and Jim Unander

**COMMITTEE RESPONSIBILITY:** This committee identifies technology tools, resources and creative ways members successfully use them to increase productivity in their practices.

Create and develop content for MDRT communications channels (MDRT-produced products, website, *Round the Table*, webinars, MDRTV, MDRT Network, blogs, podcasts, etc.).

### **SPECIFIC ASSIGNMENTS:**

1. Pre-Meeting Assignment: Create a list of technology programs and applications that you would recommend to other members. Detail the importance of each tool and explain how MDRT members may find value. For example, phones, client database, computer programs, productivity, time management and more.
  - Each committee member should contact and interview a minimum of four other producers, and report back on the programs and applications they use and how they use them.
  - Be prepared to share the tools identified at the committee meeting.
2. Based on Specific Assignment #1, create a resource/list of technology tools MDRT members can use to increase productivity.
  - Categorize by use; i.e., travel, staff, time management, client segmentation, etc.
  - Create a resource on MDRT Network.
3. Discuss how members stay current on new technologies and resources.
  - Create a list of magazines, websites, or tools for relevant and new technologies.
  - Create a resource on MDRT Network.
4. Establish a technology group on the MDRT Network. The committee members are to begin and participate in the group's discussions, initiating a minimum of one post/discussion each month.
5. Identify technology, "gadgets" (smartphones, tablets, etc.) or apps members can use for business and how.
  - The committee is responsible for providing content for the "Tips & Technology" section of *Round the Table* magazine.
6. Review past "Proceedings" presentations related to topic of technology. Identify and assign keywords and search terms for each relevant presentation.

### **MEMBERSHIP**

This committee consists of a Chair and diverse membership. Committee members are made up of members from the United States and Canada, with some representation from the Asia/Oceania/Europe regions.



The Premier Association of Financial Professionals®

## **STAFF OPERATIONS COMMITTEE**

### ***Business Development Division***

**Chair:** Roger A. Seim, MSFS, CLU  
**Divisional Vice President:** Daniel M. Boardman, CLU, CFP  
**Executive Committee Liaison:** Mark J. Hanna, CLU, ChFC  
**Staff Liaison(s):** Shawn Boothe, Jennifer Foos, and Kristin Mikrut

**COMMITTEE RESPONSIBILITY:** This committee develops resources that focus on staff structure, managing and team building, how to use staff efficiently (time management), compensation, hiring, staff responsibilities, etc. It addresses all business types to include sole proprietors, corporations, partnerships, career agents within an agency, etc.

**SPECIFIC ASSIGNMENTS:** *For the following assignments, create articles, Web resources, MDRT talk segments, etc.*

1. Pre-Meeting Assignment: Review past MDRT “Proceedings” presentations related to the topic of staff operations. Identify keywords and search terms for each presentation.
2. Pre-Meeting Assignment: Review existing MDRT resources on Staff Operations topic, and interview producers regarding staff operations in preparation for addressing the committee-specific assignments.
3. How does an MDRT member identify when it is time to hire more staff? How do they know which skills the new hire(s) will need?
4. Discuss and identify the different staff structures used by MDRT members in their practices.
  - Detail the job title, responsibility and skills needed for each staff position, and identify their importance.
5. Recruiting staff:
  - a. How to identify the need and hire the best fit for your organization. What questions should be asked during the hiring process?
  - b. Develop a list of resources that may be of value to members relative to hiring staff.
6. Identify different compensation approaches used by members.
7. Discuss and identify team-building exercises to share with staff.
8. Discuss performance management for staff.
  - Discuss approaches to performance management used by members — what works best?
  - How do you stay current on employee laws and rights?
  - What are some examples of good ways to manage corrective action?
  - Submit a list of performance management resources or tools to guide MDRT members.
9. Discuss how to motivate and retain staff.
10. Create a minimum of four resources (articles, Web resources, MDRT talk segment, etc.) for publication based on Specific Assignments #1–9.