



MDRT

The Premier Association of Financial Professionals®

EXECUTIVE STAFF



Stephen P. Stahr, CAE
Chief Executive Officer



MISSION STATEMENT:

To support the MDRT Executive Committee, lead staff and implement the direction of MDRT, while ensuring the efficiency and effectiveness of operations.

MDRTEAMEMBER YEARS:

23

ACTIVITIES/PROGRAMS INVOLVEMENT:

- Day-to-day operations
- Governance
- Industry alliances
- Strategic direction

COMMITTEE LIAISON EXPERIENCES:

- Executive Committee
- Management Council
- Assessment Task Force
- Nominating Committee
- Boomertirement Committee
- Strategic Relations Division Liaison
- External Relations Division Liaison
- Communications Division Liaison
- Leadership Development Committee
- Finance Committee
- Managing Relations Committee
- Professional Relations Committee
- Industry Relations Committee
- Media Task Force
- Client Relations Task Force
- College Scholarship Task Force
- Membership Benefits and Involvement Task Force
- Public Relations Committee
- LIFE Liaison
- Image Task Force
- Branding Task Force
- Home Office Partnership Task Force
- Presidential Commission

PROFESSIONAL RECOGNITION:

- 2009 John C. Thiel Distinguished Service Award, Association Forum of Chicagoland
- Certified Association Executive designation, 2005
- Certificate of Association Management, 1999
- Member, American Society of Association Executives (ASAE)
- Member, Association Forum of Chicagoland
- Certified Association Executive Study Group Facilitator, Association Forum of Chicagoland

SPECIAL INTERESTS:

- Family
- Sports (especially golf and Notre Dame football)
- Continuing education
- Founding and operating a nonprofit organization with my wife, Rebecca

GLOBAL TRAVEL:

Barbados, Belgium, Canada, England, Germany, India, Israel, Japan, Netherlands, Singapore, Republic of Korea, Thailand, United Arab Emirates

EDUCATION:

- B.A. Communications, Sangamon State University (now known as the University of Illinois – Springfield), Springfield, Illinois
- M.B.A., University of Maryland, College Park, Maryland
- M.S., Nonprofit and Association Management, University of Maryland, College Park, Maryland



Pamela K. Brown, CMP, CAE
Marketing and Communications Director



MISSION STATEMENT:

To be a comprehensive, integrated marketing and public relations agent for MDRT, enabling MDRT staff and its member leaders to more effectively and efficiently position MDRT as the Premier Association of Financial Professionals; promote the organization's mission, its brand, its programs and its members; and to provide quality services and products designed to enhance productivity.

MDRTEAMEMBER YEARS:

24

ACTIVITIES/PROGRAMS INVOLVEMENT:

- MDRT governance
- Leadership
- Top of the Table Tours (Australia, People's Republic of China, England, Hungary, India, Poland, Romania, Republic of Korea, New Zealand)
- Leadership Symposium staff team leader
- MDRT Power Center
- MDRT Experience team member (Singapore 1998, 2011, Hong Kong 2004, Bangkok 2006, Japan 2008, Republic of Korea 2010)
- MDRT Network

COMMITTEE LIAISON EXPERIENCES:

- Membership Invigoration (Maddock Douglas)
- Public Relations Committee
- Business and Client Development Committee
- Productivity/Practice Management Committee
- Top of the Table Division
- Client Development and Retention Committee
- Leadership and Volunteer Development Committee
- Program General Arrangements Committee
- MDRT Day
- Sales and Service Committee
- MDRT Foundation
- Annual Meeting PGA Division
- Court of the Table Forum Committee
- Member Benefits Enhancement Committee
- Professional Development Committee
- Content Development Committee
- Boomertirement Committee
- Whole Person Committee
- Management Council
- MDRT Network
- Innovation Division
- Best Practices Division

PROFESSIONAL RECOGNITION:

- Certified Association Executive (CAE)
- Certified Meeting Professional (CMP)
- Member (American Society of Association Executives)
- Member (Association Forum)

SPECIAL INTERESTS:

- Spending time with family and friends
- Reading

GLOBAL TRAVEL:

Australia, Canada, People's Republic of China, Hong Kong, Hungary, India, Japan, Mexico, New Zealand, Poland, Romania, Singapore, Republic of Korea, Thailand, United Kingdom (England)

EDUCATION:

- B.S. Marketing, Illinois State University
- Institute for Organizational Management, Villanova University
- Leadership Development Program, Center for Creative Leadership



Eryn Carter, CAE
Director of Global Markets



MISSION STATEMENT:

To enhance the membership experience, deliver benefits in meaningful ways, and apply knowledge and expertise to serve the current needs of the organization, as well as position MDRT to respond to impending changes in the composition of the membership and the global financial services industry.

MDRTEAMEMBER YEARS:

15

ACTIVITIES/PROGRAMS INVOLVEMENT:

- Global membership recruitment and retention
- Market research, analysis and reporting
- Satellite offices (Singapore, India, People's Republic of China)
- Membership communications
- MDRT Experience Team
- MDRT Days
- Executive Committee Travel

COMMITTEE LIAISON EXPERIENCES:

- Membership Communications Division
- MDRT Experience Committee
- Premium Qualifications Task Force
- Member Benefits Enhancement
- Task Force for Reorganization
- Company Relations Task Force
- Sales Ideas Committee
- USA Network Task Force
- Sales Ideas Committees (Australia, Hong Kong, South Africa)
- Strategic Partnership Committee

PROFESSIONAL RECOGNITION:

- Certified Association Executive (CAE)
- Member, American Society of Association Executives
 - International Section Council (2009-2012)
- Member, Association Forum of Chicagoland
 - International Section Committee (Present)
 - Diversity and Workforce Development Committee (2009-2011)
- LIMRA International
 - Member, Diversity Committee (2001-2009)
 - Member, International Committee (2000-2002)
- Member – Association of Fundraising Professionals (AFP)

SPECIAL INTERESTS:

- Tennis
- Yoga
- Pilates
- Cooking
- Family

GLOBAL TRAVEL:

Argentina, Australia, Belgium, Canada, People's Republic of China, Dominican Republic, England, Greece, Hong Kong, India, Israel, Indonesia, Japan, Republic of Korea, Macau, Malaysia, Mexico, Philippines, Poland, Singapore, Taiwan, Thailand, Trinidad and Tobago, United Arab Emirates, United States, Vietnam

EDUCATION:

- B.A., Sociology and Anthropology, Carleton College



Thomas Ensign Membership Director



MISSION STATEMENT:

To recruit highly productive agents and advisors as members; to process rapidly and accurately their applications for membership; to provide high-quality customer service leading to member satisfaction and annual membership renewal; and to maintain and enhance MDRT's relationships with companies and other associations.

MDRTEAMEMBER YERS:

20

ACTIVITIES/PROGRAMS INVOLVEMENT:

- Home Office Partnership (HOP) Program
- Membership recruitment and retention
- Membership application processing
- MDRT Mentoring Program

COMMITTEE LIAISON EXPERIENCES:

- Mentoring Task Force
- Premium Qualification Task Force
- Membership Communications Committee
- Management Relations Task Force
- MDRT/GAMA International Mentoring Council
- Constitution, Bylaws and Ethics Committee
- Membership Qualifications Committee
- Membership Benefits and Involvement Task Force
- Company/Broker-Dealer Task Force
- USA Network Task Force
- Leadership and Governance Task Force

PROFESIONAL RECOGNITION:

- Member, America Society of Association Executives
- Member, Association Forum of Chicagoland

SPECIAL INTERESTS:

- Avid soccer fan, member of Judson College Sports Hall of Fame (soccer)
- All things Swedish – My wife was born there
- Family; Wife (Anna), sons (Daniel, James and Peter)

GLOBAL TRAVEL:

Argentina, Austria, Belgium, Brazil, Canada, People's Republic of China, Denmark, England, France, Hong Kong, Ireland, Japan, Republic of Korea, Malaysia, Norway, Philippines, Singapore, Sweden, Wales

EDUCATION:

- B.A. Communications, Mass Media, Judson College
- Institute for Organizational Management, University of Arizona



Laura E. Good, PHR
Director of Human Resources



MISSION STATEMENT:

It is the mission of human resources to support the mission of the MDRT in meeting its goals through its most valuable resource – its PEOPLE.

MDRTEAMEMBER YEARS:

1.5 years

ACTIVITIES/PROGRAMS INVOLVEMENT:

- Federal and state compliance
- Employee benefits and payroll
- Training and development
- Staffing and recruitment
- Professional services
- Contact Center

COMMITTEE LIAISON EXPERIENCES:

- Ethics Committee
- School for New Business

PROFESSIONAL RECOGNITION:

- Professional in Human Resources (PHR) Certification, 2004
- Published in *JNM* for Growing Leaders
- Member, Society for Human Resource Management
- Member, American Society of Association Executives
- Member, Association Forum of Chicagoland

SPECIAL INTERESTS:

- Family
- Sporting activities
- Continuing education
- Traveling

GLOBAL TRAVEL:

Austria, Belgium, Brazil, Canada, People's Republic of China, Denmark, England, France, Germany, Hungary, Ireland, Italy, Japan, Monaco, Norway, Spain, Sweden, Switzerland

EDUCATION:

- B.S., Psychology



Raymond Kopcinski, CMP Meeting Services Director



MISSION STATEMENT:

To produce the most professional meetings and related media within the financial services industry while providing exceptional service and support to both our external and internal customers.

MDRTEAMEMBER YEARS:

29

ACTIVITIES/PROGRAMS INVOLVEMENT:

- The MDRT Experience Team – India 2013
- The MDRT Experience Team – Bangkok, 2012
- The MDRT Experience Team – Singapore, 2011
- The MDRT Experience Team Seoul, Republic of Korea 2010
- The MDRT Experience Team – Chiba, Japan 2008
- The MDRT Experience Team – Bangkok 2006
- The MDRT Experience Team – Hong Kong 2004
- The MDRT Experience Team – Singapore 1998

COMMITTEE LIAISON EXPERIENCES:

- Program Development Committee – PDC
- Program General Arrangements Committee – PGA
- Top of the Table
- Creativity and Technology Task Force
- MDRT Experience Task Force
- Future Annual Meeting Task Force
- Finance Committee
- Leadership Development Task Force
- Partnership Task Force
- Ambassador Task Force
- Growth Summit Task Force
- Exhibits Task Force
- ConneXion Zone Task Force

SPECIAL INTERESTS:

- Climbing
- Backpacking
- Woodworking

To date have climbed:

- 1998 Grand Teton, Wyoming (13,770 feet)
- 1999 Mt. Rainier, Washington (14,411 feet), 3 times
- 2000 Mt. Whitney, California (14,496 feet), 3 times
- 2001 Mt. Kilimanjaro, Africa (19,340 feet)*
- 2002 Mt. Elbrus, Russia (18,510 feet)*
- 2003 Mt. Shuksan, Washington (9,127 feet)
- 2004 Mt. Aconcagua, Argentina (22,834 feet)*
- 2004 Matterhorn, Switzerland (14,776 feet)

SPECIAL INTERESTS (CON'T.)

- 2006 Mt. Orizaba, Mexico (18,405 feet)
- 2006 Mt. McKinley (Denali), Alaska (20,322 feet)*
- 2007 Everest Base Camp, Nepal (17,500 feet)
- 2008 Inca Trail – Machu Piccu, Peru (11,200 feet)
- 2009 Mt. St. Helens, Washington (8,364 feet)
- 2011 Mt. Adams, Washington (12,276 feet)
- 2011 Forbidden Peak, Washington (8,815 feet)

GLOBAL TRAVEL:

Argentina, Africa, Australia, Austra, Bangkok, Beijing, Belgium, Canada, Chile, People's Republic of China, Czech Republic, England, France, Frankfort, Hong Kong, India, Italy, Japan, Republic of Korea, Kuala Lumpur, Mexico, New Zealand, Peru, Prague, Poland, Rusia, Singapore, Switzerland, United Arab Emirates

EDUCATION:

- B.A. Liberal Arts, University of Illinois
- M.A. Communications, DePaul University



**Laura McGrady, CPA
Director of Finance**



MISSION STATEMENT:

The mission of Finance is to safeguard the assets and financial integrity of MDRT and the MDRT Foundation in partnership with the organization's operating units in their efforts as stewards of the organization's resources. Finance employees do this by providing excellent service and clear information, and by promoting a creative approach to financial planning and problem solving.

MDRTEAMEMBER YEARS:

1.5 years

ACTIVITIES/PROGRAMS INVOLVEMENT:

- Monitoring budget activity
- Preparing monthly financial statements
- Managing cash flow
- Managing relationships with key external partners, including the bank, investment managers, insurance brokers and travel agents

COMMITTEE LIAISON EXPERIENCES:

- MDRT Finance Committee
- MDRT Foundation Finance Committee

PROFESSIONAL RECOGNITION:

- Certified Public Accountant
- Illinois CPA Society

SPECIAL INTERESTS:

- Family
- Friends
- Fitness

GLOBAL TRAVEL:

England, Ireland, France, Mexico, Canada, Caribbean, Puerto Rico and many of the United States

EDUCATION:

- Bachelor of Science, Accountancy – DePaul University
- Masters of Accountancy – DePaul University



Wayne Schmeiser
Director of Emerging Media



MISSION STATEMENT:

To create an innovative environment that leverages the combination of evolving technologies and current best practices in communication, social networks, new media, video and Web science.

MDRTEAMEMBER YEARS:

5 years

ACTIVITIES/PROGRAMS INVOLVEMENT:

- MDRT Network
- MDRT Connect
- MDRT Events Guide
- MDRT's Web presence

COMMITTEE LIAISON EXPERIENCES:

- Technology Committee

PROFESSIONAL RECOGNITION:

- Member, American Society of Association Executives
- Member, Association Forum of Chicagoland

SPECIAL INTERESTS:

- Sports
- Computer design and programming
- Social media
- Mobile app development
- Family: Wife (Karen), children (Jake and Keegan)

GLOBAL TRAVEL:

Mexico, St. Lucia, Germany, England, Qatar and all across the United States

EDUCATION:

- B.A., University of Miami
- M.B.A., Northern Illinois University



Jim Unander, MBA, PMP
Director of Information Technology



MISSION STATEMENT:

To inspire technical staff and business leaders to solve problems and develop solutions that satisfy both identified and underlying needs; to provide appropriate computing environments and supported technology for all MDRT functions and staff.

MDRTEAMEMBER YEARS:

Less than 1 year

ACTIVITIES/PROGRAMS INVOLVEMENT:

- Directing technology staff and initiatives for MDRT
- Assisting other MDRT staff regarding potential technology solutions, where appropriate

COMMITTEE LIAISON EXPERIENCES:

- 2014 Technology Committee

PROFESSIONAL RECOGNITION:

- Project Management Professional (PMP)

SPECIAL INTERESTS:

- Family: Laura (my wife of 31 years), daughters (Amy Rule, Shelley Rollet, Kim), son (AJ)
- Making wood furniture and buying new tools for those projects
- Hiking and camping in the mountains

GLOBAL TRAVEL:

Switzerland, Canada, Jamaica, Indonesia

EDUCATION:

- B.S., Computing and Information Services, Roosevelt University, Chicago
- M.B.A. with a concentration in International Business, Roosevelt University, Chicago