



MDRT The Premier Association of
Financial Professionals®

STRATEGIC PLAN

VISION

MDRT is:

- An international network of insurance and investment financial services professionals/advisors who serve their clients by maintaining the highest standards of ethics, knowledge and productivity;
- A member-driven association that generates a continuous flow of inspiration, motivation, networking, and strategic thinking to assist its members in better serving their clients by adapting to and growing within a changing marketplace;
- An international organization that helps shape the future of the financial services profession through the recognized exemplary performance of its members.

MISSION

The mission of MDRT is to be a valued, member-driven international network of leading insurance and investment financial services professionals/advisors who serve their clients by exemplary performance and the highest standards of ethics, knowledge, service and productivity.

GOALS AND OBJECTIVES

GOAL 1 Establish processes and programs to enhance member competence and increase their productivity and quality of service to clients.

- Objective 1a: Implement programs focused on increased member productivity.
- Objective 1b: Become a real and virtual information resource.
- Objective 1c: Provide channels for learning through networking.
- Objective 1d: Make mentoring programs available to a broad range of members and potential members.
- Objective 1e: Provide programs to promote the relationship-building approach to client service.

GOAL 2 Promote and maintain the highest standards of eligibility, integrity, business practices and ethical conduct among members.

- Objective 2a: Evaluate and develop meaningful production standards for MDRT membership in each country with members or potential members.
- Objective 2b: Strengthen the use of the MDRT Code of Ethics as a standard of membership conduct.

GOAL 3 Deliver an Annual Meeting experience that provides opportunities to enhance member productivity and quality of life.

- Objective 3a: Continually strive to improve the content and effectiveness of the Annual Meeting.
- Objective 3b: Increase the positive effect of the Annual Meeting throughout the entire MDRT membership.
- Objective 3c: Increase the benefits that members gain from the Annual Meeting both through their attendance and through programs that extend the value of the Annual Meeting to those attending and those not attending.

STRATEGIC PLAN

GOAL 4 Expand and improve MDRT as a valued meeting place to provide opportunities to enhance member productivity and quality of life.

Objective 4a: Review and evaluate existing channels for distribution of and access to MDRT programs and services, including the Annual Meeting. Alter or add channels to meet the goals and objectives of the strategic plan.

Objective 4b: Increase and expand the global presence of MDRT.

GOAL 5 Implement communications programs that inform other key publics of values and standards of MDRT and the meaning of membership.

Objective 5a: Implement communication strategies to promote the brand of MDRT and the image of the MDRT member.

Objective 5b: Implement communication strategies to help members reach their clients and potential clients.

Objective 5c: Implement communication strategies to reach other insurance and financial services professionals/advisors and organizations.

Objective 5d: Recognize membership in and support of other financial services associations that benefit the financial services profession and the life insurance based financial services professional/advisor.

GOAL 6 Promote personal growth through support of the Whole Person concept.

Objective 6a: Expand the content, effectiveness and reach of the Whole Person concept.

GOAL 7 Assure that MDRT remains a relevant and meaningful organization strategically managed and adaptable to continuous changes in the financial services profession.

Objective 7a: Establish a process to assure continuous strategic thinking, planning and action to keep the strategic plan current.

Objective 7b: Facilitate regular and timely communication with essential constituencies.

Objective 7c: Focus MDRT and its members on technology, integrating "high tech" and "high touch."

Objective 7d: Implement programs to encourage and assist members in business and succession planning.

GOAL 8 Attract and retain a larger share of members from the most productive qualified professionals.

Objective 8a: Improve and develop program content that has specific value to members at all stages of their careers and areas of interest.

Objective 8b: Target the best to include qualified non-joiners and new qualifiers in the global marketplace.

Objective 8c: Sustain an outreach program for all potential members.

GOAL 9 Increase participation in the MDRT Foundation.

Objective 9a: Encourage and promote member participation in the MDRT Foundation.

Objective 9b: Support the expansion of MDRT Foundation programs and participation internationally.