



MDRT

The Premier Association of
Financial Professionals®

focused

ON YOUR SUCCESS

2017 MDRT Goals

Bahamas

Based on 2016 Production

Following are monthly goals in Bahamas dollars to keep you on track for the 2017 Million Dollar Round Table, Court of the Table and Top of the Table. Track your progress toward 2017 membership during the 2016 production year.

Month	COMMISSION			PREMIUM			INCOME		
	MDRT	Court of the Table	Top of the Table	MDRT	Court of the Table	Top of the Table	MDRT	Court of the Table	Top of the Table
January	6,250	18,750	37,500	12,500	37,500	75,000	10,750	32,250	64,500
February	12,500	37,500	75,000	25,000	75,000	150,000	21,500	64,500	129,000
March	18,750	56,250	112,500	37,500	112,500	225,000	32,250	96,750	193,500
April	25,000	75,000	150,000	50,000	150,000	300,000	43,000	129,000	258,000
May	31,250	93,750	187,500	62,500	187,500	375,000	53,750	161,250	322,500
June	37,500	112,500	225,000	75,000	225,000	450,000	64,500	193,500	387,000
July	43,750	131,250	262,500	87,500	262,500	525,000	75,250	225,750	451,500
August	50,000	150,000	300,000	100,000	300,000	600,000	86,000	258,000	516,000
September	56,250	168,750	337,500	112,500	337,500	675,000	96,750	290,250	580,500
October	62,500	187,500	375,000	125,000	375,000	750,000	107,500	322,500	645,000
November	68,750	206,250	412,500	137,500	412,500	825,000	118,250	354,750	709,500
December	75,000	225,000	450,000	150,000	450,000	900,000	129,000	387,000	774,000



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2017 Million Dollar Round Table

(Abridged version. For more detailed information on membership requirements, go to www.mdrt.org.)

PRODUCTION CREDIT

UNLIMITED CREDIT/RISK-PROTECTION PRODUCTS

Products from life insurance companies

	<u>Commission/Fee Credit</u>	<u>Premium Credit</u>
Accidental death and dismemberment (individual)	100% of first year commission	100% of first year premium
Critical illness (individual)	100% of first year commission	100% of first year premium
Disability income contracts (individual)	100% of first year commission	100% of first year premium
Life (individual)		
Up to annual premium/target premium	100% of first year commission	100% of first year premium
Deposits in excess of annual/target premium/top up	100% of commission paid	6% of excess premium
Single premium (whole life and investment)	100% of first year commission	6% of first year premium
Short-term endowment rider (max 15 yrs)	100% of first year commission	6% of first year premium
Long-term care (individual)	100% of first year commission	100% of first year premium
Accidental death and dismemberment (group)	100% of first year commission	10% of first year premium
Critical illness (group)	100% of first year commission	10% of first year premium
Disability income contracts (group)	100% of first year commission	10% of first year premium
Life (group)	100% of first year commission	10% of first year premium
Long-term care (group)	100% of first year commission	10% of first year premium
Annuities (individual and group)	100% of all commissions	6% of new money invested
Single premium and/or short-term endowment (max 15 yrs.)	100% of first year commission	6% of first year premium

LIMITED CREDIT

Products

	<u>Commission/Fee Credit</u>	<u>Premium Credit</u>
Health care (individual)	100% of first year commission	100% of first year premium
Health care (group)	100% of first year commission	10% of first year premium
Mutual funds	100% of all commissions/fee	6% of new money invested
Securities	100% of commission on new money invested	6% of new money invested
Wrap accounts/asset management accounts	100% of all commissions/fee	6% of new money invested
Financial Planning Fees/Fees for Advice	100% of the net fee	100% of the gross fee

PRODUCTION REQUIREMENTS

1. Production Methods

Membership in the 2017 Round Table will be based on the following production methods:

• Commission/Fee Method

A minimum of USD 94,000 of eligible commissions paid is required. Of this total, a minimum of USD 47,000 of paid commissions (50 percent of the requirement) must come from products listed in the Unlimited Credit category.

• Premium Method

A minimum of USD 188,000 of eligible paid premium is required. Of this total, a minimum of USD 94,000 of premium (50 percent of the requirement) must come from products listed in the Unlimited Credit category.

• Income Qualification Method

A minimum of USD 162,000 in annual gross income from the sale of insurance and financial products is required. A minimum of USD 47,000 must be income from new business generated during the production year. Further, a minimum of USD 47,000 must be derived from income associated with risk-protection products (products eligible for Unlimited Credit under the commission or premium methods). It is possible that the same business, for example the sale of new life insurance policies, could satisfy both requirements.

2. Court of the Table

• Commission & Premium Method

A minimum of USD 282,000 of eligible commissions paid or USD 564,000 of eligible paid premium is required. At least USD 47,000 of commission or USD 94,000 of premium (50 percent of the entry-level MDRT requirement) must come from products listed in the Unlimited Credit category before an applicant can use any credit from policies listed under the Limited Credit category.

• Income Method

A minimum of USD 486,000 of eligible annual gross income is required. The applicant must meet the minimums of USD 47,000 in new business and USD 47,000 in risk-protection business.

3. Top of the Table

• Commission & Premium Method

A minimum of USD 564,000 of eligible commissions paid or USD 1,128,000 of eligible paid premium. At least USD 47,000 of commission or USD 94,000 of premium (50 percent of the entry-level MDRT requirement) must come from products listed in the Unlimited Credit category before an applicant can use any credit from policies listed under the Limited Credit category.

• Income Method

A minimum of USD 972,000 of eligible annual gross income is required. The applicant must meet the minimums of USD 47,000 in new business and USD 47,000 in risk-protection business.

• Top of the Table Waivers

Top of the Table members with a minimum of 10 years of Top of the Table membership who do not meet the required minimum production level may apply under the Top of the Table waiver provision, but must submit required Top of the Table dues.

MDRT MEETINGS

*MDRT Annual Meeting

June 12-15, 2016
Vancouver, BC, Canada

June 4-7, 2017

Orlando, Florida, USA

*Top of the Table Annual Meeting

September 21-24, 2016
Quebec City, QC, Canada

**Attendance at the MDRT Annual Meeting and Top of the Table Annual Meeting is open to approved members of the 2016 Table and requires payment of separate registration fees.*