



**MDRT** The Premier Association of  
Financial Professionals®

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ON YOUR SUCCESS

## 2017 MDRT Goals Based on 2016 Production

Barbados

Following are monthly goals in Barbados 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	9,775	29,325	58,650	19,550	58,650	117,300	16,808	50,425	100,850
February	19,550	58,650	117,300	39,100	117,300	234,600	33,617	100,850	201,700
March	29,325	87,975	175,950	58,650	175,950	351,900	50,425	151,275	302,550
April	39,100	117,300	234,600	78,200	234,600	469,200	67,233	201,700	403,400
May	48,875	146,625	293,250	97,750	293,250	586,500	84,042	252,125	504,250
June	58,650	175,950	351,900	117,300	351,900	703,800	100,850	302,550	605,100
July	68,425	205,275	410,550	136,850	410,550	821,100	117,658	352,975	705,950
August	78,200	234,600	469,200	156,400	469,200	938,400	134,467	403,400	806,800
September	87,975	263,925	527,850	175,950	527,850	1,055,700	151,275	453,825	907,650
October	97,750	293,250	586,500	195,500	586,500	1,173,000	168,083	504,250	1,008,500
November	107,525	322,575	645,150	215,050	645,150	1,290,300	184,892	554,675	1,109,350
December	117,300	351,900	703,800	234,600	703,800	1,407,600	201,700	605,100	1,210,200



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## 2017 Million Dollar Round Table

(Abridged version. For more detailed information on membership requirements, go to [www.mdrt.org](http://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.