



MDRT The Premier Association of
Financial Professionals®

focused

ON YOUR SUCCESS

2017 MDRT Goals

New Zealand

Based on 2016 Production

Following are monthly goals in New Zealand 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	11,825	35,475	70,950	23,650	70,950	141,900	20,342	61,025	122,050
February	23,650	70,950	141,900	47,300	141,900	283,800	40,683	122,050	244,100
March	35,475	106,425	212,850	70,950	212,850	425,700	61,025	183,075	366,150
April	47,300	141,900	283,800	94,600	283,800	567,600	81,367	244,100	488,200
May	59,125	177,375	354,750	118,250	354,750	709,500	101,708	305,125	610,250
June	70,950	212,850	425,700	141,900	425,700	851,400	122,050	366,150	732,300
July	82,775	248,325	496,650	165,550	496,650	993,300	142,392	427,175	854,350
August	94,600	283,800	567,600	189,200	567,600	1,135,200	162,733	488,200	976,400
September	106,425	319,275	638,550	212,850	638,550	1,277,100	183,075	549,225	1,098,450
October	118,250	354,750	709,500	236,500	709,500	1,419,000	203,417	610,250	1,220,500
November	130,075	390,225	780,450	260,150	780,450	1,560,900	223,758	671,275	1,342,550
December	141,900	425,700	851,400	283,800	851,400	1,702,800	244,100	732,300	1,464,600



The Premier Association of
Financial Professionals®

focused

ON YOUR SUCCESS

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.