



MDRT The Premier Association of
Financial Professionals®

focused

ON YOUR SUCCESS

United States

2017 MDRT Goals Based on 2016 Production

Following are monthly goals in U.S. 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	MDRT	Court of the Table	Top of the Table
January	\$7,833	\$23,500	\$47,000	\$15,667	\$47,000	\$94,000	\$13,500	\$40,500	\$81,000	\$40,500	\$121,500	\$81,000
February	\$15,667	\$47,000	\$94,000	\$31,333	\$94,000	\$188,000	\$27,000	\$81,000	\$162,000	\$81,000	\$243,000	\$162,000
March	\$23,500	\$70,500	\$141,000	\$47,000	\$141,000	\$282,000	\$40,500	\$121,500	\$243,000	\$121,500	\$364,500	\$243,000
April	\$31,333	\$94,000	\$188,000	\$62,667	\$188,000	\$376,000	\$54,000	\$162,000	\$324,000	\$162,000	\$486,000	\$324,000
May	\$39,167	\$117,500	\$235,000	\$78,333	\$235,000	\$470,000	\$67,500	\$202,500	\$405,000	\$202,500	\$607,500	\$405,000
June	\$47,000	\$141,000	\$282,000	\$94,000	\$282,000	\$564,000	\$81,000	\$243,000	\$486,000	\$243,000	\$729,000	\$486,000
July	\$54,833	\$164,500	\$329,000	\$109,667	\$329,000	\$658,000	\$94,500	\$283,500	\$567,000	\$283,500	\$850,500	\$567,000
August	\$62,667	\$188,000	\$376,000	\$125,333	\$376,000	\$752,000	\$108,000	\$324,000	\$648,000	\$324,000	\$972,000	\$648,000
September	\$70,500	\$211,500	\$423,000	\$141,000	\$423,000	\$846,000	\$121,500	\$364,500	\$729,000	\$364,500	\$1093,500	\$729,000
October	\$78,333	\$235,000	\$470,000	\$156,667	\$470,000	\$940,000	\$135,000	\$405,000	\$810,000	\$405,000	\$1215,000	\$810,000
November	\$86,167	\$258,500	\$517,000	\$172,333	\$517,000	\$1,034,000	\$148,500	\$445,500	\$891,000	\$445,500	\$1336,500	\$891,000
December	\$94,000	\$282,000	\$564,000	\$188,000	\$564,000	\$1,128,000	\$162,000	\$486,000	\$972,000	\$486,000	\$1458,000	\$972,000



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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.*