



MDRT

 MDRT<sup>®</sup> Member's Manual

Your guide to high-performance membership

The Premier Association of Financial Professionals<sup>®</sup>

## Introduction

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As a Million Dollar Round Table (MDRT) member, you are among the best and brightest in the financial services profession. Your membership connects you to the greatest resources, solutions and minds in the business. This manual identifies what your fellow members consider some of the best benefits that come with membership in The Premier Association of Financial Professionals. Each section tells you how to discover the deeper value of each benefit and take full advantage of your membership.

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## Table of Contents

Annual Meeting	2
Recognition	3
Productivity and Sales Ideas	4
Inspiration and Motivation	5
Achievement Opportunities	6
Professional Development	7
Practice Management	8
Client Communications	9
Networking	10
Personal Development	11
MDRT Headquarters Contacts	12

## Annual Meeting

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The MDRT Annual Meeting is your reward to yourself for last year's hard work, and the inspiration that helps you qualify again the following year. Each year, more than 6,000 members travel from all areas of the United States and from more than 60 countries around the globe to share ideas, consider new perspectives and gain the education that propels them to the next level in their business.

Widely considered to be the best meeting of its kind held anywhere in the world, you benefit from hearing industry experts and professional motivators, and from networking with thousands of your peers.

- **Attend the MDRT Annual Meeting**, the Round Table's signature event.
- **Volunteer to help during the Annual Meeting** as a PGA Ambassador. Volunteering is a great way to meet other members, and it opens the door to leadership opportunities through MDRT's committee system.
- **Relive the experience**, or share it with others, by purchasing instant recordings of the motivational and educational presentations on site at the meeting.

After the Annual Meeting, take advantage of the ideas presented by the inspirational and educational speakers.

- **Purchase Annual Meeting audio presentations** at the MDRT Power Center, MDRT's online store.
- **Request a copy of the *Proceedings*** (free to members who request it on their membership applications) in either a hardcover book or a text CD-ROM. Annual Meeting *Proceedings* dating back to 1988 are also available in an online archive.

## Recognition

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Membership in MDRT is a distinguishing career milestone that is only available to those who have demonstrated exceptional professional knowledge, expertise and client service. Showing pride in what you do reinforces your image within the industry, and helps clients see your commitment to them and their families.

- **Use your MDRT member logo** on your business cards and stationery.
- **Purchase MDRT insignia products** to show the world you are part of The Premier Association of Financial Professionals.
- **Mail your business card to your clients** in an MDRT client brochure.

*“In a world where compromise and mediocrity are the norm, MDRT stands for and maintains excellence.”*

**Moshe K. Hadari, CertPFS,  
CertCIIMP**  
London, England  
MDRT member since 1986

*“MDRT has allowed me to ‘dream and walk’ with the industry giants. Each time I attend the MDRT conference, I’m able to learn and grow in my practice.”*

**J. George Reilly**  
Piscataway, New Jersey  
MDRT member since 1996

*“MDRT is the premier choice for sales and marketing ideas, motivation and inspiration.”*

**Mark S. Jones**  
Houston, Texas  
MDRT member since 1979

*“MDRT is the greatest experience for motivation and confirmation in the industry! It inspires me each year to become a better person and advisor.”*

**Robelynn H. Abadie, LUTCF, RFC**  
Baton Rouge, Louisiana  
MDRT member since 1985

## Productivity and Sales Ideas

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Members attend the Annual Meeting, read *Round the Table* magazine, scour the *Proceedings*’ online archives and read the e-newsletters to harvest their peers’ ideas — those that are tried and true or on the industry’s cutting edge. These sources offer you access to the best minds in the industry — your fellow Round Table members.

- **Access sales ideas** in the members-only section of [www.mdrt.org](http://www.mdrt.org) or in the Bright Ideas section of *Round the Table*.
- **Tap into MDRT’s member research** to uncover leading-edge data on business trends, as well as the actions and attitudes of your professional peers.
- **Receive the latest information**, sales ideas and upcoming MDRT events from the biweekly MDRT e-Newsletter (sent to all members with e-mail addresses on file).
- **Increase your productivity** by mentoring through the MDRT/GAMA International Mentoring Program, and enjoy the satisfaction of helping someone else achieve the prestige of MDRT membership.
- **Subscribe** to the free monthly Sales Ideas e-Newsletter.

## Inspiration and Motivation

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MDRT recognizes that the good work you do is difficult. Knowing your clients make important decisions about their future based on your advice creates tremendous pressure. MDRT is your escape from the pressure. Every aspect of your membership is designed to keep you inspired and motivated. Whether from the words of a speaker at an MDRT Annual Meeting, a relationship with a fellow member, or through volunteerism and charitable giving, MDRT knows how important it is to keep you motivated. You are among the best in the industry — and as long as you are an MDRT member, you will remain among the best.

- **Join the MDRT VideoClub** to gain access to more than 500 motivational, educational and inspirational videos featuring presentations from the Annual Meeting.
- **Touch the lives of others less fortunate** through involvement in the MDRT Foundation. The charity resulting from your donations to the MDRT Foundation showcases the generous and caring spirit of MDRT members and raises the bar on the integrity of the entire life insurance and financial services industry.





## Achievement Opportunities

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Your experience with MDRT starts with membership, but the road can lead you to earn additional recognition and attain advanced levels of membership.

- **Top of the Table**, MDRT's highest level of membership, is open to those who submit six times the MDRT production requirement and pay additional dues. These highly accomplished members network and share ideas at a separate Top of the Table Annual Meeting and a special session at the MDRT Annual Meeting. Additionally, Top of the Table members have an exclusive members-only Web site loaded with advanced sales ideas and other career-sustaining material.
- **Court of the Table** membership is open to members who submit three times the MDRT production requirement and pay additional dues. They are eligible to attend a special session at the MDRT Annual Meeting.
- **MDRT's Quarter Century Club** recognizes members with at least 25 years of membership and provides them a forum at the MDRT Annual Meeting to meet and share ideas.
- **MDRT Honor Roll** members are recognized for accumulating 15 or more years of membership with production.

## Professional Development

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MDRT members are continually taking steps to improve their performance. The desire to grow is infectious, and members help one another develop and refine their skills. The more you know, the more you can help your clients. To that end, the Round Table maintains an inventory of products (accessible via our online store, [www.mdrtpowercenter.org](http://www.mdrtpowercenter.org)) that is full of educational materials — many authored by your fellow MDRT members — that can make a significant difference in your ability to guide clients to beneficial solutions.

- **Search the MDRT Power Center** for books, CDs and DVDs on useful topics such as:
  - Sales Ideas
  - Prospecting
  - Practice Management
  - Objections
  - Estate Planning
  - Marketing/Branding
  - Closing
- **Read *Round the Table* magazine** as a source of information for communicating with your clients, reaching out to prospects to enhance relationships and boosting business. Each issue has an entire section devoted to sharing proven, transferable sales ideas from MDRT members.
- **Display your commitment** to the highest standards of ethical conduct and client care with a membership plaque from the MDRT Power Center.
- **Educate yourself** with MDRT's topical Web seminars, which are offered at no cost to members.
- **Give back to the industry** — mentor another advisor through the MDRT/GAMA International Mentoring Program and see your productivity grow, too.

*“MDRT helps me to evaluate my professionalism and standards. I am constantly aware of improving myself.”*

**Priscilla Pham Thu Tam**  
Singapore  
MDRT member since 1989

*“MDRT’s Court of the Table and Top of the Table levels give me targets to shoot for and help me maintain my focus.”*

**Robert L. Avery II, CLU, ChFC**  
Denver, Colorado  
MDRT member since 1985

*“MDRT provides me with ideas to help me run my office and organize my life. Not one day goes by without some connection to MDRT.”*

**Helen A. Jenkins, DipPFS**  
Cardiff, Wales  
MDRT member since 1990

*“People stopped me on the street to tell me they’d read about my recent accomplishments. I couldn’t have found a more inexpensive, efficient way to get my name out than the tools provided by MDRT.”*

**Scott Alexander Burrell, RFC, CSA**  
Fayetteville, Georgia  
MDRT member since 2003

## Practice Management

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One of the greatest benefits of having access to financial services professionals in more than 70 countries around the world is learning how they do business and incorporating their best ideas into your own practice. Learning new strategies from other top professionals helps you keep more of what you earn by showing you how to operate your practice more efficiently and effectively.

- **Become an expert at running your office and managing your staff** by learning from other members’ experiences in the members-only area of [www.mdrt.org](http://www.mdrt.org).
- **Learn all aspects of practice management** with “The ‘How To’ Book: A Practice Management Guide,” found in the MDRT Power Center.
- **Subscribe** to MDRT’s free monthly Practice Management e-Newsletter.

## Client Communications

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Presenting your community with a positive image of yourself and your practice is an excellent way to attract new prospects and make clients feel good about keeping you as their advisor. MDRT's professional public relations staff can help you develop a positive reputation in your community, which, in turn, will contribute to your bottom line. Through the MDRT Web site, all members have access to personalized press releases, sample advertisements, customized brochures, as well as media interview tips and techniques.

- **Learn how to leverage your MDRT membership** with a 30-minute free consultation with MDRT's public relations firm, Gibbs & Soell.
- **Download a customized press release** announcing your membership or attendance at the Annual Meeting.
- **Educate your clients** about their financial planning needs by sending them MDRT's free client newsletter, *Insights*.
- **Build relationships** with your clients by using the client tips on MDRT's Web site.
- **Send your clients a customized brochure** that offers them information on a product or your area of expertise.

## Networking

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If you were to conduct a search for “John Savage” or “Ben Feldman” on MDRT’s Web site, those names would appear dozens of times in the *MDRT Proceedings*. Those men are industry legends who continue to touch the lives — and careers — of generations of MDRT members. They did this through networking. The stories of Savage and Feldman sharing their wisdom with other MDRT members have become legendary — almost folklore. But this type of connectivity really happens through MDRT membership. Through membership, you can develop meaningful, long-lasting relationships with members from all over the world.

Beyond the networking opportunities that abound at the Annual Meeting, you can make a connection with others through the MDRT’s powerful Web site.

- **Search** MDRT’s exclusive membership directory.
- **Share ideas and discuss industry concerns** through the MDRT Member Blog.
- **Form a study group** with other MDRT members.

## Personal Development

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The Round Table is unique in its power to motivate the heart and spirit of its members and to help them achieve a more meaningful, satisfying life.

- **Live your life according to the Whole Person concept**, which emphasizes that members should be well-rounded and involved in all aspects of life: health, family, spiritual, education, financial, service and career.
- **Rediscover the special connection of family** through “FamilyTime,” a DVD the Round Table co-produced with the National Association of Realtors.
- **Share Whole Person materials and products** with your family and friends – they will thank you.
- **Showcase the generous and caring spirit** of you and other MDRT members through the MDRT Foundation. This spirit raises the integrity of the entire life insurance profession to a whole new level.

*“I love being part of a group of people who are proud of their chosen career and are willing to freely share ideas and experiences with others in this industry.”*

**Michael Peter Beder, CFP**  
Sandton, South Africa  
MDRT member since 1985

*“MDRT’s Whole Person concept has made me a better husband, father and person.”*

**David L. Alarid**  
Newport Beach, California  
MDRT member since 1989

## MDRT Headquarters Contacts

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### A

**Annual Meeting information** [meetings@mdrt.org](mailto:meetings@mdrt.org)

**Annual Meeting *Proceedings*** [www.mdr.org](http://www.mdr.org)

### B/C

**Client Communication Tools** [publicrelations@mdrt.org](mailto:publicrelations@mdrt.org)

**Court of the Table** [info@mdrt.org](mailto:info@mdrt.org)

**Customized brochure** [publicrelations@mdrt.org](mailto:publicrelations@mdrt.org)

**Customized press releases** [publicrelations@mdrt.org](mailto:publicrelations@mdrt.org)

### D/E

**E-newsletter archives** [www.mdr.org](http://www.mdr.org)

**Educational Products** [orders@mdrt.org](mailto:orders@mdrt.org)

### F

**FamilyTime DVD** [www.mdrtpowercenter.org](http://www.mdrtpowercenter.org)

### G/H

**“The ‘How To’ Book:  
A Practice Management Guide”** [www.mdrtpowercenter.org](http://www.mdrtpowercenter.org)

### I

**Insignia products and  
client brochures** [www.mdrtpowercenter.org](http://www.mdrtpowercenter.org)

**Insights client newsletter** [www.mdr.org](http://www.mdr.org)

### J/K/L

**Logos** [www.mdr.org](http://www.mdr.org)

### M

**MDRT Community** [www.mdr.org](http://www.mdr.org)

**MDRT Foundation** [www.mdrtfoundation.org](http://www.mdrtfoundation.org)

**MDRT/GAMA International  
Mentoring Program** [info@mdrt.org](mailto:info@mdrt.org)

**MDRT membership directory** [www.mdr.org](http://www.mdr.org)

**MDRT Power Center** [www.mdrtpowercenter.org](http://www.mdrtpowercenter.org)

**Membership information** [membership@mdrt.org](mailto:membership@mdrt.org)

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## **N/O/P**

**On-line Store** [www.mdrtpowercenter.org](http://www.mdrtpowercenter.org)

**Practice management ideas** [www.mdrt.org](http://www.mdrt.org)

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## **Q/R**

**Research** [www.mdrt.org](http://www.mdrt.org)

***Round the Table* magazine** [www.mdrt.org](http://www.mdrt.org)

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## **S**

**Sales ideas** [www.mdrt.org](http://www.mdrt.org)

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## **T**

**Top of the Table** [info@mdrt.org](mailto:info@mdrt.org)

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## **U/V/W/X/Y/Z**

**VideoClub** [www.mdrtpowercenter.org](http://www.mdrtpowercenter.org)





MDRT®

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