



# MDRT

The Premier Association  
of Financial Professionals®

## 2023 MDRT Goals Based on 2022 Production

United States

Following are monthly goals in U.S. dollars to keep you on track for the 2023 Million Dollar Round Table, Court of the Table and Top of the Table. Track your progress toward 2023 membership during the 2022 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	\$5,750	\$17,250	\$34,500	\$11,500	\$34,500	\$69,000	\$10,000	\$30,000	\$60,000
February	\$11,500	\$34,500	\$69,000	\$23,000	\$69,000	\$138,000	\$20,000	\$60,000	\$120,000
March	\$17,250	\$51,750	\$103,500	\$34,500	\$103,500	\$207,000	\$30,000	\$90,000	\$180,000
April	\$23,000	\$69,000	\$138,000	\$46,000	\$138,000	\$276,000	\$40,000	\$120,000	\$240,000
May	\$28,750	\$86,250	\$172,500	\$57,500	\$172,500	\$345,000	\$50,000	\$150,000	\$300,000
June	\$34,500	\$103,500	\$207,000	\$69,000	\$207,000	\$414,000	\$60,000	\$180,000	\$360,000
July	\$40,250	\$120,750	\$241,500	\$80,500	\$241,500	\$483,000	\$70,000	\$210,000	\$420,000
August	\$46,000	\$138,000	\$276,000	\$92,000	\$276,000	\$552,000	\$80,000	\$240,000	\$480,000
September	\$51,750	\$155,250	\$310,500	\$103,500	\$310,500	\$621,000	\$90,000	\$270,000	\$540,000
October	\$57,500	\$172,500	\$345,000	\$115,000	\$345,000	\$690,000	\$100,000	\$300,000	\$600,000
November	\$63,250	\$189,750	\$379,500	\$126,500	\$379,500	\$759,000	\$110,000	\$330,000	\$660,000
December	<b>\$69,000</b>	<b>\$207,000</b>	<b>\$414,000</b>	<b>\$138,000</b>	<b>\$414,000</b>	<b>\$828,000</b>	<b>\$120,000</b>	<b>\$360,000</b>	<b>\$720,000</b>



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## 2023 Million Dollar Round Table

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

### PRODUCTION 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

#### OTHER PRODUCTS

##### 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/fee 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 2023 Round Table will be based on the following production methods:

- **Commission/Fee Method**  
A minimum of USD 69,000 of eligible commissions paid is required.
- **Premium Method**  
A minimum of USD 138,000 of eligible paid premium is required.
- **Income Qualification Method**  
A minimum of USD 120,000 in annual gross income from the sale and service of insurance and financial products is required. A minimum of USD 34,500 must be income from new business generated during the production year.

##### 2. Court of the Table

- **Commission & Premium Method**  
A minimum of USD 207,000 of eligible commissions paid or USD 414,000 of eligible paid premium is required.
- **Income Method**  
A minimum of USD 360,000 of eligible annual gross income is required. The applicant must meet the minimums of USD 34,500 in new business.

##### 3. Top of the Table

- **Commission & Premium Method**  
A minimum of USD 414,000 of eligible commissions paid or USD 828,000 of eligible paid premium.
- **Income Method**  
A minimum of USD 720,000 of eligible annual gross income is required. The applicant must meet the minimums of USD 34,500 in new 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 26-29, 2022  
Boston, Massachusetts, USA

June 25-28, 2023  
Nashville, Tennessee, USA

##### \*Top of the Table Annual Meeting

October 19-22, 2022  
Santa Barbara, California, USA

##### \*EDGE Meeting

November 7-9, 2022  
Orlando, Florida, USA

##### \*MDRT Global Conference

August 28-31, 2022  
Sydney, Australia

*\*Attendance at the MDRT Annual Meeting, MDRT Global Conference, EDGE Meeting and Top of the Table Annual Meeting are open to approved members of the 2022 Table and requires payment of separate registration fees.*

#### Elimination of the Unlimited Credit Requirement for the United States

MDRT has eliminated the requirement that a minimum of 50 percent of an applicant's qualifying production come from Unlimited Credit or "core products." Beginning with the 2019 membership year, applicants from the United States will be able to qualify using *any* MDRT eligible product in *any* combination or proportion.

The change in the requirement applies to qualification using the Commission, Premium and Income methods and is designed to ensure compliance with the fiduciary rule established by the U.S. Department of Labor.