

FREQUENTLY ASKED QUESTIONS

WHO IS ELIGIBLE?

- › First-line managers (heads of traditional or multi-line agencies or firms) and frontline or second/middle-line managers (sales or unit managers), defined as:
 - Any individual responsible for the strategic leadership and operational management of a financial services firm or agency, such as general agents, OSJs and managing partners
 - Any individual responsible for recruiting, selecting, training, supervising or coaching financial services advisors or agents, such as managing directors, sales managers and agency/firm owners
 - › Applicants must personally supervise full-time career agents, advisors or sales representatives in an agency or firm.
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WHO IS NOT ELIGIBLE?

- › Any individual responsible for providing key leadership or support to the corporation's field leaders, sales force or curriculum development, such as chief learning officers, chief marketing officers and chief distribution officers.
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HOW DO I ENROLL IN THE AGENCY MANAGER PROGRAM?

- › Individuals must have five members registered for the 2023 MDRT Annual Meeting or the MDRT Global Conference. Enrollment forms received with less than five registered attendees will be held in pending status until all five submitted names are registered.
 - › You must create a user profile at my.mdr.org. Once your profile is completed, email your MDRT ID number to agencymngmtprogram@mdrt.org to fully activate your profile. You will receive an email from MDRT when your profile is activated and you may enter your five attendees.
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DOES THE MANAGER HAVE TO PAY TO ATTEND THE MEETING?

- › Managers will be subject to the same fee schedule as MDRT members.
 - › Direct questions regarding registration to MDRT's Meeting Services department at meetings@mdrt.org.
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WHAT HAPPENS IF I CAN'T MEET THE REQUIRED FIVE REGISTRANTS?

- › Unfortunately, you must have five registered members to enroll in the program. There are no exceptions.
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CAN I SHARE AN MDRT MEMBER ID WITH ANOTHER MANAGER?

- › No, each manager must provide five unique registered members to enroll in the Agency Manager Program.
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ARE THERE RESTRICTIONS TO WHAT SESSIONS I CAN ATTEND AT THE MEETING?

- › With the exception of closed meetings or private events, managers can attend all sessions.
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WHEN AND HOW DO I REGISTER FOR THE MEETING?

- › Once a manager is enrolled in the Agency Manager Program and meets all the requirements, they will receive an email with the 2023 MDRT Annual Meeting or MDRT Global Conference registration link.
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IS THERE A DEADLINE TO ENROLL IN THE AGENCY MANAGER PROGRAM?

- › No, registrations are on a first-come, first-served basis. However, if the 2023 MDRT Annual Meeting or MDRT Global Conference reaches capacity, the Agency Manager Program will also be closed.
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IF MY QUESTIONS ARE NOT LISTED HERE, WHOM DO I CONTACT?

- › Questions regarding the Agency Manager Program should be directed to agencymngmtprogram@mdrt.org.
 - › Questions regarding the 2023 MDRT Annual Meeting or MDRT Global Conference should be directed to meetings@mdrt.org.
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