

Automatic Certifying Letters

Each year, a number of companies send MDRT certifying letters to representatives who qualified for MDRT based on the business placed with their company. Sending automatic certifying letters has several benefits, including:

- Letting producers know that they qualified for MDRT. It is also an opportunity for a home office executive to encourage membership in a cover letter.
- Allowing the company's certifying officer to schedule the generation of certifying letters, reducing the number of urgent, last-minute requests from producers.
- Automating what would otherwise be a manual process, allowing greater efficiency and productivity.

Guidelines for Automatic Certifying Letters

- 1. Identify the eligible agents.** After the company's books are closed for the year, identify the agents to receive automatic certifying letters. Some companies include agents who met at least 80 percent of the MDRT requirement.
- 2. Download the MDRT certifying letter.** The letters can be found at: <https://www.mdr.org/companies/>. Please select the proper language and format for your needs. The production information can be arranged to print in the appropriate places on the certifying letter form through an automated process, such as a mail merge. The bar code in the upper right corner of the certifying letter is required. Please do not create your own certifying letters, as it will significantly delay the processing of your members' applications.
- 3. Sign the automatic certifying letter.**
Electronic or stamped signatures are acceptable.
- 4. Send the automatic certifying letter to the eligible agents.** Be sure to inform the agents that this is their MDRT certifying letter and they do not need to send the one included in the application packet from MDRT to you for certification. Important: Allow enough time for the agents to request an application from MDRT. A mailing date of mid-January is best.

For further information, please contact the Member Relations Department

Phone: 847.692.6378 Fax: 847.518.0697 e-mail: MemberRelations@mdrt.org