



COMPANY PROFILE

Form Submission Date: _____

New Company **Update / Information Change**

For Internal MDRT use only:	
Company ID#	_____

Parent Company (if applicable): _____

Company Type _____

(See Page 2 for Definition)

If updating Company Name Please Provide Previous Company name to be updated:

Company Name (*New, if applicable*): _____

Company Headquarters Address: _____

City: _____ State/Province: _____

Postal Code: _____ Country: _____

CEO: **New** **Replacement** _____
Name of previous CEO

CEO Name: _____

Email: _____

Address: _____
(If different from above)

City: _____ State/Province: _____

Postal Code: _____ Country: _____

CERTIFYING OFFICER (*see Page 2 for Definition*): **New** **Replacement** _____
Name of previous Certifying Officer

Name: _____

Position Title: _____

Email: _____

Address: _____
(If different from above)

City: _____ State/Province: _____

Postal Code: _____ Country: _____

Phone: _____ Ext. _____

SUBMIT COMPLETED FORM TO: Companies@mdrt.org

COMPANY ADMINISTRATOR (see Definitions below): **New** **Replacement** _____
Name of previous Company Administrator

Name: _____

Position Title: _____

Email: _____

Address: _____
(If different from above)

City: _____ State/Province: _____

Postal Code: _____ Country: _____

Phone: _____ Ext. _____

COMPANY CONTACT (see Definitions below): **New** **Replacement** _____
Name of previous Company Contact

Name: _____

Position Title: _____

Email: _____

Address: _____
(If different from above)

City: _____ State/Province: _____

Postal Code: _____ Country: _____

Phone: _____ Ext. _____

DEFINITION OF TERMS:

- INSURANCE COMPANY** - A company that manufactures, underwrites, and/or sells insurance products.
- BROKER DEALER (USA & Canada only)** – A firm that buys and sells securities on its own account or on behalf of its customers.
- GENERAL AGENCY (outside the USA/Canada)** – A company that has a contractual agreement with one or more insurers to sell their insurance products through their direct sales force.
- BANCASSURER** – A bank that sells insurance products through its own distribution channels.

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- CERTIFYING OFFICER** – This individual will be responsible for certifying production data submitted for MDRT membership; can access the list of all current MDRT members affiliated with their company and submit membership applications on-line.
 - COMPANY ADMINISTRATOR** – This individual will be able to access the list of all current MDRT members affiliated with their company and submit membership applications on-line.
 - COMPANY CONTACT** – This individual can access the full list of all current MDRT members affiliated with their company.

For internal MDRT use only: _____ GM entered _____ Date Entered _____ Member Processing entered _____ Date Entered
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