



MDRT

The Premier Association
of Financial Professionals®

Canada

2020 MDRT Goals Based on 2019 Production

Following are monthly goals in Canadian dollars to keep you on track for the 2020 Million Dollar Round Table, Court of the Table and Top of the Table. Track your progress toward 2020 membership during the 2019 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	10,100	30,300	60,600	20,200	60,600	121,200	17,492	52,475	104,950
February	20,200	60,600	121,200	40,400	121,200	242,400	34,983	104,950	209,900
March	30,300	90,900	181,800	60,600	181,800	363,600	52,475	157,425	314,850
April	40,400	121,200	242,400	80,800	242,400	484,800	69,967	209,900	419,800
May	50,500	151,500	303,000	101,000	303,000	606,000	87,458	262,375	524,750
June	60,600	181,800	363,600	121,200	363,600	727,200	104,950	314,850	629,700
July	70,700	212,100	424,200	141,400	424,200	848,400	122,442	367,325	734,650
August	80,800	242,400	484,800	161,600	484,800	969,600	139,933	419,800	839,600
September	90,900	272,700	545,400	181,800	545,400	1,090,800	157,425	472,275	944,550
October	101,000	303,000	606,000	202,000	606,000	1,212,000	174,917	524,750	1,049,500
November	111,100	333,300	666,600	222,200	666,600	1,333,200	192,408	577,225	1,154,450
December	121,200	363,600	727,200	242,400	727,200	1,454,400	209,900	629,700	1,259,400



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2020 Million Dollar Round Table

(Abridged version. For more detailed information on membership requirements, go to www.mdrtd.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 2020 Round Table will be based on the following production methods:

• Commission/Fee Method

A minimum of USD 97,000 of eligible commissions paid is required. Of this total, a minimum of USD 48,500 of paid commissions (50 percent of the requirement) must come from products listed in the Risk-Protection category.

• Premium Method

A minimum of USD 194,000 of eligible paid premium is required. Of this total, a minimum of USD 97,000 of premium (50 percent of the requirement) must come from products listed in the Risk-Protection category.

• Income Qualification Method

A minimum of USD 168,000 in annual gross income from the sale of insurance and financial products is required. A minimum of USD 48,500 must be income from new business generated during the production year. Further, a minimum of USD 48,500 must be derived from income associated with products in the Risk-Production category. It is possible that the same business, for example the sale of new life insurance policies, could satisfy both requirements.

2. Court of the Table

• Commission & Premium Method

A minimum of USD 291,000 of eligible commissions paid or USD 582,000 of eligible paid premium is required. At least USD 48,500 of commission or USD 97,000 of premium (50 percent of the entry-level MDRT requirement) must come from products listed in the Risk-Protection category before an applicant can use any credit from policies listed under the Other Products category.

• Income Method

A minimum of USD 504,000 of eligible annual gross income is required. The applicant must meet the minimums of USD 48,500 in new business and USD 48,500 in risk-protection business.

3. Top of the Table

• Commission & Premium Method

A minimum of USD 582,000 of eligible commissions paid or USD 1,164,000 of eligible paid premium. At least USD 48,500 of commission or USD 97,000 of premium (50 percent of the entry-level MDRT requirement) must come from products listed in the Risk-Protection category before an applicant can use any credit from policies listed under the Other Products category.

• Income Method

A minimum of USD 1,008,000 of eligible annual gross income is required. The applicant must meet the minimums of USD 48,500 in new business and USD 48,500 in risk-protection 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 9-12, 2019
Miami Beach, Florida, USA

June 2020
TBD, USA

*Top of the Table Annual Meeting

September 25-28, 2019
Austin, Texas, USA

*EDGE Meeting

October 21-23, 2019
New York City, New York, USA

*MDRT Global Conference

September 1-4, 2019
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 2019 Table and requires payment of separate registration fees.*