



MDRT
The Premier Association
of Financial Professionals®

ישראל

מטרות MDRT 2020 בהתבסס על תפוקה 2019

להלן מטרות חודשיות בשקלים חדשים ישראליים כדי לשמור אותך על מסלול השולחן העגול 2020, בהתאם לדרגות אשר בחלק העליון של הטבלה. עקוב אחר ההתקדמות שלך לעבר חברות 2020 במהלך התפוקה 2019

חודש	עמלות			פרמיות			הכנסות		
	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
ינואר	29,592	88,775	177,550	59,183	177,550	355,100	51,258	153,775	307,550
פברואר	59,183	177,550	355,100	118,367	355,100	710,200	102,517	307,550	615,100
מרץ	88,775	266,325	532,650	177,550	532,650	1,065,300	153,775	461,325	922,650
אפריל	118,367	355,100	710,200	236,733	710,200	1,420,400	205,033	615,100	1,230,200
מאי	147,958	443,875	887,750	295,917	887,750	1,775,500	256,292	768,875	1,537,750
יוני	177,550	532,650	1,065,300	355,100	1,065,300	2,130,600	307,550	922,650	1,845,300
יולי	207,142	621,425	1,242,850	414,283	1,242,850	2,485,700	358,808	1,076,425	2,152,850
אוגוסט	236,733	710,200	1,420,400	473,467	1,420,400	2,840,800	410,067	1,230,200	2,460,400
ספטמבר	266,325	798,975	1,597,950	532,650	1,597,950	3,195,900	461,325	1,383,975	2,767,950
אוקטובר	295,917	887,750	1,775,500	591,833	1,775,500	3,551,000	512,583	1,537,750	3,075,500
נובמבר	325,508	976,525	1,953,050	651,017	1,953,050	3,906,100	563,842	1,691,525	3,383,050
דצמבר	355,100	1,065,300	2,130,600	710,200	2,130,600	4,261,200	615,100	1,845,300	3,690,600



2020 Million Dollar Round Table

(Abridged version. For more detailed information on membership requirements, go to www.mdrt.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-Protection 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

*MDRT Global Conference

September 1-4, 2019
Sydney, Australia

*Attendance at the MDRT Annual Meeting, MDRT Global Conference and Top of the Table Annual Meeting is open to approved members of the 2019 Table and requires payment of separate registration fees.