

2024
OUTLOOK

mdrt



MDRT[®]

DEAR FRIENDS OF MDRT,



I am honored to share with you this year's MDRT Outlook. Thinking back to when I first qualified for MDRT membership 25 years ago, I could not have envisioned the limitless possibilities, not just for myself as an advisor but for MDRT as an organization.

There has never been a better or more exciting time to be involved with MDRT, The Premier Association of Financial Professionals®.

MDRT is flourishing and transforming as a global group. Our worldwide membership of nearly 95,000 top performers is a core strength and point of pride. That is a record number of members for MDRT, representing more than 700 companies in 80 nations and territories.

That is why MDRT is committed to ensuring every member has the localized resources they need to enhance their connectedness with MDRT and its membership, no matter where they live and work. MDRT will continue delivering powerful tools to help members thrive in their professional and personal lives.

MDRT also has a renewed commitment to financial advisors throughout their careers. Our Family of Brands includes the MDRT Academy, which helps aspiring members achieve MDRT-level production. It is now available in five languages, with Spanish being the latest addition. We also have the MDRT Center for Field Leadership, which helps team and field leaders become the best they can be.

What does this mean for members across the Family of Brands? More value, better engagement, higher production and a stronger Million Dollar Round Table!

As MDRT nears its centennial anniversary in 2027, we are already preparing for the next 100 years. The best is yet to come, and we will continue to get stronger – together.

Sincerely,

Gregory B. Gagne, ChFC

2024 MDRT President

Million Dollar Round Table

TABLE OF CONTENTS

PRESIDENT'S LETTER 3

SUCCESS WITHIN THE PROFESSION 5

MEMBERSHIP QUALIFICATIONS 5

2023 GLOBAL MEMBERSHIP STATISTICS 6

2023 MEMBERSHIP BY COUNTRY 7

2023 TOP 10 MULTINATIONAL COMPANIES 7

CORE VALUES SPANNING BORDERS 8

A FAMILY LIKE NO OTHER 8

MDRT CODE OF ETHICS 10

WHOLE PERSON CONCEPT 11

MDRT FOUNDATION 12

WHAT IS COMING UP 14

MDRT MEETINGS 14

MDRT'S RESOURCES ACROSS PLATFORMS 16

SHARED LEARNING TO TAKE US FURTHER 17

PASSIONATE LEADERS 18

MDRT EXECUTIVE COMMITTEE 18

2024 MDRT GLOBAL COUNCIL 20

MDRT PAST PRESIDENTS 21

MDRT EXECUTIVE STAFF AND DEPARTMENTS 26

Success Within the Profession

MDRT members represent the top advisors in the financial services profession, and becoming an MDRT member is a key highlight of an advisor's career. It signifies that they demonstrate exceptional productivity, strong leadership skills and exponential growth in their personal and professional lives.

MEMBERSHIP QUALIFICATIONS

To qualify for MDRT, prospective members must adhere to MDRT's ethical standards and meet specific production requirements.

Qualifications for 2024 membership, based on 2023 production, are below. Court of the Table and Top of the Table serve as additional incentives for members to increase their levels of production, leading to additional recognition and access to exclusive benefits.

COMMISSION	INCOME	PREMIUM
USD 74,000 MDRT	USD 128,000 MDRT	USD 148,000 MDRT
USD 222,000 Court of the Table	USD 384,000 Court of the Table	USD 444,000 Court of the Table
USD 444,000 Top of the Table	USD 768,000 Top of the Table	USD 888,000 Top of the Table

MDRT Facts (as of July 1, 2023)

Members	85,849
Companies represented	720
Nations and territories represented	83
MDRT	73,458
Court of the Table	8,558
Top of the Table	3,833
Members from the U.S.	6,948
Members from outside the U.S.	78,901

2023 GLOBAL MEMBERSHIP STATISTICS

MDRT.....	73,458
Court of the Table.....	8,558
Top of the Table	3,833

	ALL MDRT	MDRT ONLY	COURT OF THE TABLE ONLY	TOP OF THE TABLE ONLY
Total members	85,849	73,458	8,558	3,833
Qualifying members (Q+QL)	82,423	70,265	8,537	3,621
Commissions				
AVERAGE	USD 181,557	USD 127,458	USD 310,578	USD 816,682
MEDIAN	USD 103,942	USD 92,892	USD 252,807	USD 572,416
Commissions per case				
AVERAGE	USD 1,300	USD 901	USD 1,566	USD 3,781
MEDIAN	USD 1,234	USD 1,054	USD 2,153	USD 5,774
Cases (lives)				
AVERAGE	106	94	154	185
MEDIAN	63	59	90	92
Premiums				
AVERAGE	USD 342,348	USD 259,097	USD 656,495	USD 1,667,180
MEDIAN	USD 190,153	USD 174,970	USD 490,234	USD 1,085,638
Income				
AVERAGE	USD 281,403	USD 184,582	USD 467,945	USD 1,164,109
MEDIAN	USD 188,108	USD 168,343	USD 432,764	USD 949,862

* Production values reported are for Qualifying members only.

Qualifying members include all Qualifying (Q) and Qualifying and Life (QL) members. "MDRT" stands for "Million Dollar Round Table." All values are calculated independently; totals may not equal the exact sum of components. Court of the Table values exclude Top of the Table members.

Commissions, premiums or incomes above USD 100,000,000 were not used. Lives greater than 10,000 were not used.

* Data is from July 1, 2023.

2023 MEMBERSHIP BY MARKET

1	China	17,182
2	Japan	11,325
3	U.S.	6,948
4	Hong Kong, China	6,925
5	India	6,070
6	Singapore	5,228
7	Taiwan Area	5,131
8	Thailand	4,973
9	Vietnam	4,818
10	Malaysia	3,321

2023 TOP 10 MULTINATIONAL COMPANIES SUPPORTING MDRT

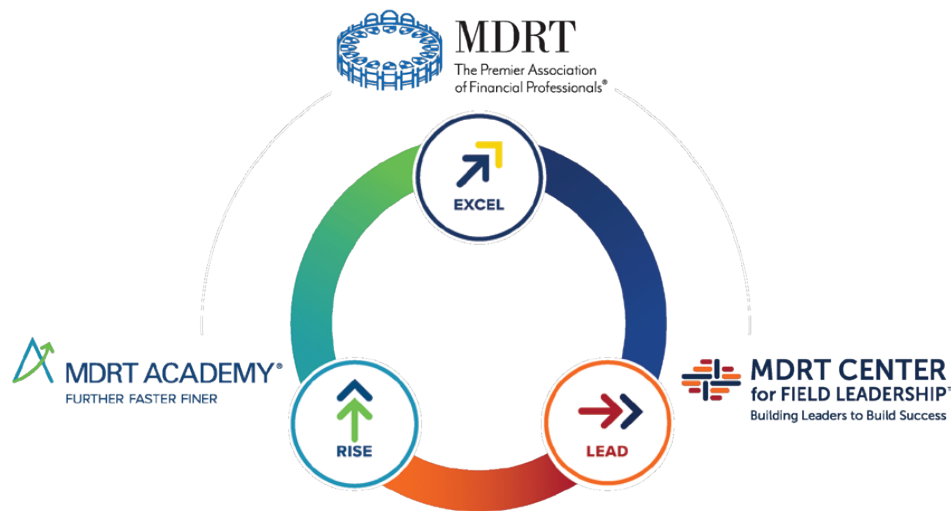
1	AIA Group, Hong Kong, China	15,579
2	Prudential plc, U.K.	6,971
3	Manulife Financial Corporation, Canada	5,110
4	Prudential Financial, U.S.	2,981
5	MetLife, U.S.	2,938
6	FWD Group, Hong Kong, China	2,131
7	New York Life, U.S.	1,967
8	Great Eastern Group, Singapore	1,591
9	AXA Group, France	1,465
10	Allianz SE, Germany	1,457

Core Values Spanning Borders

We believe in sustainable core values, regardless of time or border. No matter where they are in their careers, financial services professionals can always benefit from the MDRT Family of Brands, where shared learnings and striving for excellence connect every member across the globe. Furthermore, MDRT members adhere to strict professional and ethical standards. They embody the Whole Person concept and serve their communities to achieve balanced lifestyles.

A FAMILY LIKE NO OTHER

The MDRT Family of Brands, comprising MDRT, the MDRT Academy and the MDRT Center for Field Leadership, serves financial services professionals at every stage of their careers. MDRT helps advisors hone their skills while growing their business. The MDRT Academy provides advisors with next-level knowledge to help them reach MDRT qualification. The MDRT Center for Field Leadership is designed for field leaders who want to build an MDRT culture of excellence within their teams.



MDRT ACADEMY®
Further. Faster. Finer.®

MDRT®
The Premier Association
of Financial Professionals®

MDRT CENTER
for FIELD LEADERSHIP®
Building Leaders to
Build Success®

An association for financial professionals working toward MDRT-level production.

Accessible anytime, anywhere through a mobile app and website.

Learn best practices from the best in the business through more than 1,200 MDRT-approved articles, videos, podcast episodes, Webcasts and Performance Guides.

Personalized and flexible platform with goal-setting and tracking tools to keep advisors on course to reach MDRT.

Access to MDRT members' expertise through a discussion forum, the MDRT Mentoring Program and attendance at MDRT events.

A global association of financial professionals committed to aiming higher and achieving more.

Access to career-changing ideas from a supportive network of peers.

An unparalleled mix of content and resources featuring proven methods and best practices for growth.

A tradition of building and upholding exceptional professional knowledge, client service and ethical standards.

A variety of in-person meetings, bringing members together to collaborate for personal and professional achievement.

A growth-focused association for field and home office leaders to expand their business and leadership expertise.

Practical, expert-level resources that comprehensively address core skills necessary for leaders to excel.

Connection with fellow leaders in close-knit study groups and masterclasses, sharing challenges and best practices.

Tools to develop an MDRT culture and increase productivity and retention within teams.

Recognizing excellence in leadership with the exclusive Culture of Excellence Awards.

MDRT CODE OF ETHICS

MDRT members should be ever mindful that complete compliance with and observance of the MDRT Code of Ethics shall serve to promote the highest quality standard of membership and client service. These standards will be beneficial to the public and to the insurance and financial services profession.

THEREFORE, MEMBERS SHALL:

2 Maintain the highest standards of professional competence by seeking to maintain and improve professional knowledge, skills and competence.

4 Make full and adequate disclosure of all facts necessary to enable your clients to make informed decisions.

6 Determine that any replacement of a life insurance or financial product must be beneficial for the client.

1 Always place the best interests of your clients above your own direct or indirect interests.

3 Hold in the strictest confidence and consider as privileged all business and personal information pertaining to your clients' affairs.

5 Maintain personal conduct which will reflect favorably on the insurance and financial services profession and the Million Dollar Round Table.

7 Abide by and conform to all provisions of the laws and regulations in the jurisdictions in which you do business.

WHOLE PERSON CONCEPT

It can be easy to fixate on professional success and lose sight of other equally meaningful aspects of our lives, such as family or community service. MDRT advocates the Whole Person concept and provides resources to help members expand their focus and achieve a balanced lifestyle.

Robust, healthy lifestyle

Within MDRT, members know their ability to creatively problem-solve for clients is dependent on their own physical and mental well-being. They thus strive to maintain a sound and balanced mind and body through lifestyle choices, improving the quality of their life and a more productive business.

Strong, fulfilling relationships

MDRT members make it a priority to spend meaningful time with family and friends so they can build relationships based on sharing, love, mutual respect and openness. This is the foundation for happiness and prosperity for all members.

Intellectual development

Intellectual curiosity is a core value of every MDRT member. They believe in the power of lifelong learning and actively seek the growth it provides. Incorporating a new skill or gaining knowledge drives members forward as professionals and individuals.

Career success and growth

No matter the pace, forward momentum will lead to accomplishing goals.

Continual membership in MDRT reflects how members value this incremental progress, as engaging with fellow peers provides opportunities to gain new perspectives and continued growth.

Financial security

MDRT members lead by example. They follow the advice they give to their clients and take steps to nurture their own financial security. Keeping personal finances in order removes potential distractions and helps members concentrate on their clients' needs.

Commitment to community service

Every MDRT member strives to provide service to others and be a positive influence on their community. By contributing their time, energy and financial resources with no expectation of personal gain, they become uplifting role models.

Spiritual and personal values

MDRT members align their work with their values and spiritual beliefs. They find long-term meaning and purpose by cultivating these facets of their lives to grow toward greater fulfillment.



Altevette Project, a school in Upper Mustang, Nepal, that provides accommodations and education to girls in the local areas, was awarded a USD 4,000 grant to teach computer skills and purchase seven personal computers.

MDRT FOUNDATION

MDRT members formed the MDRT Foundation to support causes they are passionate about and to represent the caring spirit of the financial services profession. For more than 65 years, the MDRT Foundation has been committed to supporting charities that MDRT members select. Since 1959, the MDRT Foundation has awarded more than USD 42 million in grants in all 50 U.S. states and more than 70 countries.



Boys & Girls Clubs of San Dieguito, located in California, was awarded a USD 5,000 grant to support summer camp programming for under-resourced youth.

Global Grants Program

The MDRT Foundation Global Grants Program funds a diverse range of charitable projects worldwide. This is an exclusive member benefit that allows MDRT members to endorse a charity for funding consideration.

Grant applications are accepted online from May to September 1 each year.



2023 CHARITABLE IMPACT

MDRT Annual Meeting and MDRT Global Conference

All Hands and Hearts (AHAH) is a charitable organization committed to effectively addressing the immediate and long-term needs of global communities impacted by disasters. AHAH arrives early for first response and stays late to rebuild schools and homes in a disaster-resilient way. During the Annual Meeting, MDRT members raised more than USD 106,750 for AHAH and also registered volunteers for the program.



An MDRT member at the Annual Meeting posing with the MDRT Foundation "Heart Wall," which showcases member donations.



Diana Chao, founder and executive director of Letters to Strangers, presenting on Main Platform.

Top of the Table Annual Meeting

Letters to Strangers is an award-winning, global, youth-run mental health organization that works to destigmatize mental illness and increase access to affordable, quality treatment, particularly for youth. Meeting attendees participated in an on-site workshop and fundraiser.

MDRT EDGE

New Image Youth Center (NIYC), based in Orlando, Florida, USA, is a youth organization that provides year-round programs for students of all ages in the local area, from childhood into adulthood. Participants in the MDRT Foundation service project assembled 250 care bags and craft jars for children and their families.



Dr. Shantá Barton-Stubbs, founder and executive director of the New Image Youth Center, with Heather Lindsley, LUTCF, RICP, MDRT Foundation Treasurer, at the meeting's on-site service project.

In total, the MDRT Foundation awarded USD 1.8 million to nearly 400 charities last year.

To learn more about the MDRT Foundation, visit mdrtfoundation.org or email foundation@mdrt.org.

What Is Coming Up

MDRT MEETINGS

MDRT offers a variety of meetings for members to come together, learn and share ideas, ultimately leading to personal and professional advancement. The MDRT Annual Meeting, MDRT Global Conference, Top of the Table Annual Meeting and MDRT EDGE have proven to be the foundation of MDRT – uniting a community of premier financial services professionals to experience innovative content, first-class industry speakers and unparalleled networking.

**MDRT
ANNUAL
MEETING
2024
VANCOUVER**

MDRT Annual Meeting

MDRT's exclusive and prestigious Annual Meeting distills the essence of MDRT to our diverse, global membership, offering value to members across markets and career stages throughout the MDRT Family of Brands.

June 9-12, 2024
Vancouver, British Columbia, Canada

MDRT Global Conference

Focused on recognizing achievements of members in emerging markets and deepening their engagement, this meeting offers opportunities to celebrate the growth and success of members and their companies amid regional peers throughout the MDRT Family of Brands.

August 27-30, 2024
Dubai, UAE



**TOP
OF THE
TABLE**

ANNUAL MEETING
September 25-28, 2024
Fairmont Orchid, Hawaii, USA

Top of the Table Annual Meeting

This intimate meeting for top-performing advisors delivers premier opportunities to learn and network with professional peers.

September 25-28, 2024
Kohala Coast, Hawaii, USA

**MDRT
EDGE
ATLANTA**

MDRT EDGE

Focused on growth opportunities for members in the U.S. and Canada, this meeting leverages cutting-edge learning formats to help members build valuable networks and create actionable business plans for the coming year.

November 4-6, 2024
Atlanta, Georgia, USA

MDRT's Resources Across Platforms

Members can now follow MDRT's proprietary content on different platforms: **mdrt.org**, the MDRT Podcast, *Round the Table* magazine, the MDRT Blog and more. MDRT content and resources are regularly updated, so members have access to the latest information and trends shaping the financial services profession.

Global network: MDRT members in different countries share their experiences and ideas to stay ahead of the curve. The MDRT Mentoring Program provides support for members to keep growing.

Round the Table: MDRT's bimonthly magazine zeroes in on trends and opportunities within the financial services profession.

MDRT's website: Access MDRT's multimedia resources on a variety of topics, connect with fellow members through the Member Directory and learn more about upcoming MDRT meetings – all courtesy of **mdrt.org**.

Meetings: Learn from and be inspired by the best financial services professionals from around the world at the MDRT Annual Meeting, MDRT Global Conference, Top of the Table Annual Meeting and MDRT EDGE.

MDRT Podcast: MDRT's exclusive podcast series features members' tips for increasing business efficiency, appreciating clients, adding value to your practice, confronting frequently encountered challenges and more personal success stories. Released monthly, each episode can be streamed or downloaded at **mdrt.org/podcast**.

MDRT Blog: With new posts every week, the award-winning MDRT Blog provides useful and up-to-date content on the latest industry trends and topics. Members can access proven strategies to best advise clients, run a practice, achieve work-life balance and more at **mdrt.org/blog**.

MDRT Connect e-newsletters: Sent on a monthly basis, MDRT's e-newsletter is full of curated content, allowing members to harvest peers' proven business ideas and concepts from a global perspective. The e-newsletters are now available in versions created specifically to address local trends and diverse business solutions.

Shared Learning to Take Us Further

We believe in the power of sharing innovative ideas to advance individual and industry growth. MDRT offers its members a multitude of tools to enhance knowledge, including:

Local webinars and events: Our MDRT Community Leaders and Membership Communications Committee teams create opportunities for members to connect close to home and expand their local professional networks virtually or in person.

MDRT Member Toolkit: The toolkit helps users better position themselves as MDRT members when working with their clients and prospects. The toolkit includes news releases, advertisements, updates on emerging trends and logos to promote MDRT membership in local communities.

MDRT industry studies: MDRT is at the forefront of industry trends and shares those insights with members to keep their skills up to date. Topics include emotional intelligence, economic outlook, fintech, financial wellness and do-it-yourself personal finance.

MDRT Media Program: MDRT members frequently contribute to various external trade publications like InsuranceNewsNet, Advisor News, Advisor Today, The Independent, Perspectives and more to share their insights with the wider industry. If you are interested in learning more about the media program as a member or an editor, please reach out to **mdrt@gsccommunications.com**.

MDRT Mentoring Program: With a 12-month guided program, MDRT's online mentoring platform empowers members and potential MDRT members to learn from industry-leading experts and provides willing mentors with the means to share the knowledge and skills they have accumulated over the course of their careers.

Passionate Leaders

MDRT EXECUTIVE COMMITTEE

MDRT is governed and managed by a five-member Executive Committee duly elected each year by the membership. The 2024 MDRT Executive Committee includes:



Gregory B. Gagne, ChFC
President

Gregory B. Gagne, ChFC, is the 2024 President of MDRT. He is a 25-year MDRT member with 20 Court of the Table and 16 Top of the Table qualifications. An Excalibur Knight of the MDRT Foundation, Gagne is also a member of its Inner Circle Society and has served on its Board of Trustees. Gagne is the founder of Affinity Investment Group LLC, which provides wealth management and distribution-planning services. His extensive MDRT volunteerism has included roles as Top of the Table Global Council Member and Advisory Board Chair and the 2020 Program Development Global Council Member. He has spoken at 12 MDRT meetings.



Peggy Tsai, RFP, CCFP
Immediate Past President

Peggy Tsai, RFP, CCFP, is the 2024 Immediate Past President of MDRT. She is a 23-year MDRT member with 16 Court of the Table and six Top of the Table qualifications. She is also a Platinum Knight of the MDRT Foundation and a member of its Inner Circle Society. Tsai, an advisor with Shin Kong Life Insurance Co., has won the award for No. 1 sales achievement in her company for seven consecutive years. Tsai has held numerous volunteer leadership positions for MDRT, including Divisional Vice President of Membership Communications Committee (MCC) Division 2, MCC Region Chair and MCC Zone Chair. Tsai has also volunteered in several capacities for MDRT's meetings and has presented at the MDRT Annual Meeting. In addition to her MDRT involvement, Tsai has spoken to numerous audiences of financial professionals and has contributed to industry publications in her region.

Carol Kheng, ChFC, is the 2024 First Vice President of MDRT. She is a 26-year MDRT member with four Court of the Table and three Top of the Table qualifications. A Diamond Knight of the MDRT Foundation, Kheng is also a member of its Inner Circle Society and has served on its Board of Trustees. A master financial consultant with Prudential Assurance Company Singapore, Kheng focuses on estate planning for high-net-worth individuals. Kheng's extensive MDRT volunteerism includes roles as Divisional Vice President of the Global Conference Program General Arrangements (PGA) Division and Divisional Vice President Member Resources - Practice Management Division. Kheng is also a 2020 Prudential Presidents' Club awardee and has been a member of Prudential's Quality Club Elite and Star Club since 1996. In 2005, she was the founding member and chairperson of Prudential's MDRT Club.



Carol Kheng, ChFC
First Vice President

John F. Nichols, MSM, CLU, is the 2024 Second Vice President of MDRT. He is a 24-year MDRT member with 19 Court of the Table and 17 Top of the Table qualifications. He is also a Past President of the MDRT Foundation as well as a Royal Order Excalibur Knight and a member of its Inner Circle Society. Nichols is president of Disability Resource Group Inc., a national insurance agency that he founded in 1999. Additionally, he is a partner with Acisure, a global fintech services provider. Nichols has spoken at the MDRT Annual Meeting five times and the Top of the Table Annual Meeting once. He has also spoken at more than 500 programs and events throughout the U.S.



John F. Nichols, MSM, CLU
Second Vice President

Clay Gillespie, CFP, CLU, is the 2024 Secretary of MDRT. He is a 23-year MDRT member with 21 Court of the Table and 20 Top of the Table qualifications. He is also an Excalibur Knight of the MDRT Foundation. Gillespie is a financial advisor, portfolio manager and managing director with RGF Integrated Wealth Management in Vancouver, British Columbia, Canada. He specializes in retirement income planning. Gillespie's extensive MDRT volunteerism began in 2007, and he has since served on an array of committees in various roles. In 2019, Gillespie served as Global Council Member and Advisory Board Chair of the Top of the Table Division. He has also served as Global Council Member of the Finance Division. Other leadership positions include service as Captain of the 2015 MDRT Annual Meeting Focus Session Committee and Chair of several committees within the Top of the Table Division.



Clay Gillespie, CFP, CLU
Secretary

2024 MDRT GLOBAL COUNCIL

Global Council is MDRT's leadership team. It comprises the Executive Committee and each of the following Global Council Members:

Anthony G. Engrassia, ChFC, LUTCF	Member Resources Best Practices Division 1
Brad J. Myers	Member Resources Best Practices Division 2
Cheng Huann Yeoh, ChFC, CLU	Member Resources Best Practices Division 3
Yuji Uchikawa, AFP	Member Resources Best Practices Division 4
Mathew Thomas Fogarty, CFP, Dip FP	Membership Communications Division 1
Chan Hyun Baek	Membership Communications Division 2
Julianne Hertel, CLU, ChFC	Membership Communications Division 3
Shuk Ping Joyce Wu, BA (Hons), FChFP	Membership Communications Division 4
Shane Seung Bong Lee	Annual Meeting Program Development Division
Thian Lung Jong	Annual Meeting Program General Arrangements Division
Pearlyn Koh, ChFC	Global Conference Program Development Division
Santhosh M. Sunny, MBA	Global Conference Program General Arrangements Division

MDRT Past Presidents

YEAR	TOTAL MEMBERSHIP
1927	*Paul F. Clark, CLU, John Hancock, Boston, Massachusetts 32 Meeting at the Peabody, Memphis, Tennessee, USA
1928	*William M. Duff, CLU, Equitable - New York, Pittsburgh, Pennsylvania 39 Meeting at the Book-Cadillac, Detroit, Michigan, USA
1929	*George E. Lackey, CLU, MassMutual, Detroit, Michigan 64 Meeting at the Mayflower, Washington, D.C., USA
1930	*Earl G. Manning, John Hancock, Boston, Massachusetts 118 Meeting at the Royal York, Toronto, Ontario, Canada
1931	*Theodore M. Riehle, CLU, Equitable - New York, New York, New York 168 Meeting at the William Penn, Pittsburgh, Pennsylvania, USA
1932	*Robert A. Brown, Pacific Mutual, Los Angeles, California 125 Meeting at The Fairmont, San Francisco, California, USA
1933	*M.J. Donnelly, Equitable - New York, New Castle, Pennsylvania 101 Meeting at The Stevens, Chicago, Illinois, USA
1934	*Thomas M. Scott, Penn Mutual, Philadelphia, Pennsylvania 118 Meeting at The Schroeder, Milwaukee, Wisconsin, USA
1935	*Caleb R. Smith, MassMutual, Fort Lauderdale, Florida 124 Meeting at The Savery, Des Moines, Iowa, USA
1936	*Harry T. Wright, Equitable - New York, Chicago, Illinois 143 Meeting at the Ritz- Carlton, Boston, Massachusetts, USA
1937	*Grant Taggart, California - Western States, Cowley, Wyoming 158 Meeting at the Brown Palace, Denver, Colorado, USA
1938	*Jack Lauer, Penn Mutual, Cincinnati, Ohio 162 Meeting at The Rice, Houston, Texas, USA
1939	*Paul C. Sanborn, Connecticut Mutual, Boston, Massachusetts 163 Meeting at The Jefferson, St. Louis, Missouri, USA
1940	*Henry G. Mosler, MassMutual, Los Angeles, California 154 Meeting at the Bellevue -Stratford, Philadelphia, Pennsylvania, USA
1941	*H. Kennedy Nickell, CLU, Connecticut General, Chicago, Illinois 171 Meeting at the Netherland Plaza, Cincinnati, Ohio, USA
1942	*Robert P. Burroughs, National Life - Vermont, Manchester, New Hampshire 223 No meeting due to war.
1943	*Ron Stever, CLU, Equitable - New York, Los Angeles, California 232 Meeting at the William Penn, Pittsburgh, Pennsylvania, USA
1944	*A.J. Osteimer III, Northwestern Mutual, Honolulu, Hawaii 408 Meeting at The Statler, Detroit, Michigan, USA
1945	*John E. Clayton, MassMutual, Newark, New Jersey, USA 468 No meeting due to war.
1946	*Louis Behr, CLU, Equitable - New York, Chicago, Illinois 525 Meeting at French Lick Springs, French Lick, Indiana, USA

*DECEASED

MDRT Past Presidents

YEAR	TOTAL MEMBERSHIP
1947	*Harold S. Parsons, The Travelers, Corona Del Mar, California 726 Meeting at the New Ocean House, Swampscott, Massachusetts, USA
1948	*Paul H. Dunnavan, CLU, Canada Life, Minneapolis, Minnesota 829 Meeting at French Lick Springs, French Lick, Indiana, USA
1949	*Paul W. Cook, CLU, Mutual Benefit Life, Chicago, Illinois 824 Meeting at the Netherland Plaza, Cincinnati, Ohio, USA
1950	*Theodore Widing, CLU, Provident Mutual, Philadelphia, Pennsylvania 790 Meeting at Haddon Hall, Atlantic City, New Jersey, USA
1951	*John O. Todd, CLU, Northwestern Mutual, Evanston, Illinois 949 Meeting at the Hotel Del Coronado, Coronado, California, USA
1952	*Walter N. Hiller, CLU, Penn Mutual, Chicago, Illinois 1,065 Meeting at the Mount Washington, Bretton Woods, New Hampshire, USA
1953	*William T. Earls, CLU, Mutual Benefit Life, Cincinnati, Ohio 1,240 Meeting at The Greenbrier, White Sulphur Springs, West Virginia, USA
1954	*G. Nolan Bearden, New England Life, Atlanta, Georgia 1,492 Meeting at the Hotel Del Coronado, Coronado, California, USA
1955	*George B. Byrnes, CLU, New England Life, Palos Verdes, California 1,557 Meeting at The Greenbrier, White Sulphur Springs, West Virginia, USA
1956	*Arthur F. Priebe, CLU, Penn Mutual, Rockford, Illinois 2,013 Meeting on the Kungsholm to Bermuda
1957	*Howard D. Goldman, CLU, Northwestern Mutual, Richmond, Virginia 2,438 Meeting at The Greenbrier, White Sulphur Springs, West Virginia, USA
1958	*William D. Davidson, CLU, Equitable - New York, Chicago, Illinois 2,987 Meeting at the Banff Hotel, Banff, Alberta, Canada
1959	*Adon N. Smith II, CLU, Northwestern Mutual, Charlotte, North Carolina 2,688 Meeting at the Americana, Bal Harbour, Florida, USA
1960	*Robert S. Albritton, CLU, Provident Mutual, Los Angeles, California 3,040 Meeting at the Hilton Hawaiian Village, Honolulu, Hawaii, USA
1961	*James B. Irvine Jr., CLU, Northwestern Mutual, Chattanooga, Tennessee 2,932 Meeting at the Americana, Bal Harbour, Florida, USA
1962	*Lester A. Rosen, CLU, Union Central, Memphis, Tennessee 3,122 Meeting at The Queen Elizabeth, Montreal, Quebec, Canada
1963	*Daniel H. Coakley, New York Life, Boston, Massachusetts 3,420 Meeting on The Kungsholm to Bermuda
1964	*Alfred J. Lewallen, CLU, Mutual Benefit Life, Miami, Florida 3,202 Meeting at The Diplomat, Hollywood, Florida, USA
1965	*Iram H. Brewster, Phoenix Mutual, Pittsburgh, Pennsylvania 3,636 Meeting at The Broadmoor, Colorado Springs, Colorado, USA
1966	*Donald Shepherd, John Hancock, Boston, Massachusetts 4,076 Meeting at the Statler Hilton, Boston, Massachusetts, USA

1967	*Frank E. Sullivan, CLU, Mutual Benefit Life, Newark, New Jersey 4,616 Meeting at Congress Hall, Lucerne, Switzerland
1968	*Sadler Hayes, Penn Mutual, New York, New York 5,078 Meeting at the Masonic Memorial Temple, San Francisco, California, USA
1969	*Stanley S. Watts, CLU, Equitable - New York, Miami, Florida 5,689 Meeting at The Diplomat, Hollywood, Florida, USA
1970	*John H. Ames, CLU, Mutual Benefit Life, Morristown, New Jersey 6,675 Meeting at the Hilton Hawaiian Village, Honolulu, Hawaii, USA
1971	*Richard G. Bowers, CLU, New York Life, Keokuk, Iowa 7,589 Meeting at The Washington Hilton, Washington, D.C., USA
1972	*James B. Longley, CLU, New England Life, Lewiston, Maine 8,361 Meeting at The Queen Elizabeth, Montreal, Quebec, Canada
1973	*Henry F. McCamish Jr., CLU, MassMutual, Atlanta, Georgia 9,587 Meeting at The Seattle Center, Seattle, Washington, USA
1974	*C. Robinson Fish III, CLU, Northwestern Mutual, Boston, Massachusetts 10,987 Meeting at the Fontainebleau, Miami Beach, Florida, USA
1975	Jack Peckinpugh, CLU, ChFC, Indianapolis Life, Muncie, Indiana 12,422 Meeting at the Masonic Memorial Temple, San Francisco, California, USA
1976	*Rulon E. Rasmussen, CLU, New York Life, Phoenix, Arizona 11,804 Meeting at The Hynes Auditorium, Boston, Massachusetts, USA
1977	*Marshall I. Wolper, CLU, Equitable - New York, Miami, Florida 12,757 Meeting at the Atlanta Civic Center, Atlanta, Georgia, USA
1978	*Jack L. McKewen, CLU, Fidelity Mutual, Birmingham, Alabama 14,742 Meeting at the Blaisdell Center, Honolulu, Hawaii, USA
1979	*Paul L. Oliver Jr., CLU, Prudential of America, San Francisco, California 17,205 Meeting at McCormick Place, Chicago, Illinois, USA
1980	*Millard J. Grauer, CLU, Equitable - New York, Chicago, Illinois 17,406 Meeting at The Rivergate, New Orleans, Louisiana, USA
1981	*Clune J. Walsh Jr., CLU, Home Life, Detroit, Michigan 17,581 Meeting at Radio City Music Hall, New York, New York, USA
1982	*Stanley Liss, CLU, New York Life, New York, New York 17,737 Meeting at the Atlanta Civic Center, Atlanta, Georgia, USA
1983	Jack B. Turner, CLU, ChFC, General American Life, Clarksville, Tennessee 17,679 Meeting at the Dallas Convention Center, Dallas, Texas, USA
1984	*Paul R. Buckley, CLU, New England Life, Lewiston, Maine 18,964 Meeting at Radio City Music Hall, New York, New York, USA
1985	Ron D. Barbaro, North American Life, Toronto, Ontario, Canada 21,722 Meeting at the San Francisco Civic Auditorium, San Francisco, California, USA
1986	*Frank Friedler Jr., CLU, Home Life, New Orleans, Louisiana 20,598 Meeting at the Orange County Convention/Civic Center, Orlando, Florida, USA

*DECEASED

MDRT Past Presidents

YEAR	TOTAL MEMBERSHIP
1987	*Wilmer S. Poyner III, CLU, ChFC, New York Life, Birmingham, Alabama 17,051 Meeting at McCormick Place, Chicago, Illinois, USA
1988	Arlen I. Prentice, CLU, ChFC, Seattle, Washington 16,944 Meeting at the Atlanta Civic Center, Atlanta, Georgia, USA
1989	G. Carey Hauenstein, CLU, State Mutual of America, Laurel, Mississippi 16,792 Meeting at the Metro Toronto Convention Centre, Toronto, Ontario, Canada
1990	*David H. Hilton, CLU, ChFC, Northwestern Mutual Life, Chicago, Illinois 16,393 Meeting at the San Francisco Civic Auditorium, San Francisco, California, USA
1991	Seymour Petrovsky, CLU, Business Men's Assurance, Phoenix, Arizona 16,297 Meeting at the New Orleans Convention Center, New Orleans, Louisiana, USA
1992	William T. O'Donnell, MassMutual, Chicago, Illinois 15,957 Meeting at McCormick Place, Chicago, Illinois, USA
1993	Charles D. Marks, CLU, ChFC, Prudential of America, New Orleans, Louisiana 15,721 Meeting at the Hynes Convention Center, Boston, Massachusetts, USA
1994	*Lyle L. Blessman, Northwestern Mutual, Englewood, Colorado 15,686 Meeting at the Dallas Convention Center, Dallas, Texas, USA
1995	Robert B. Plybon, CLU, ChFC, Phoenix Home Life, Greensboro, North Carolina .. 15,703 Meeting at the Metro Toronto Convention Centre, Toronto, Ontario, Canada
1996	Walter G. Schnee III, Phoenix Home Life, Pasadena, California 18,784 Meeting at the Anaheim Convention Center, Anaheim, California, USA
1997	John W. Cruikshank III, CLU, Northwestern Mutual, Deerfield, Illinois 18,815 Meeting at the Atlanta Civic Center, Atlanta, Georgia, USA
1998	Gene L. Mahn, CLU, ChFC, MassMutual, Thousand Oaks, California 19,182 Meeting at McCormick Place, Chicago, Illinois, USA
1999	*Reginald N. Rabjohns, CLU, ChFC, New England Financial, Chicago, Illinois 21,262 Meeting at Ernest N. Morial Convention Center, New Orleans, Louisiana, USA
2000	Brian H. Ashe, CLU, Independent, Lisle, Illinois 23,341 Meeting at Bill Graham Civic Auditorium, San Francisco, California, USA
2001	Tony Gordon, Independent, Bristol, England, United Kingdom 25,037 Meeting at Metro Toronto Convention Centre, Toronto, Canada
2002	Marvin H. Feldman, CLU, ChFC, New York Life, East Liverpool, Ohio 28,282 Meeting at Gaylord Opryland Resort and Convention Center, Nashville, Tennessee, USA
2003	*Richard H. Sullenger, GenAmerica Financial, Bakersfield, California 27,665 Meeting at Paris and Bally's Hotel and Casino, Las Vegas, Nevada, USA
2004	George B. Pickett, J.D., CLU, Valmark Securities, Jackson, Mississippi 29,652 Meeting at the Anaheim Convention Center, Anaheim, California, USA
2005	Adelia C. Chung, CLU, ChFC, Chung Insurance and Investment Group, Honolulu, Hawaii 33,297 Meeting at the Ernest N. Morial Convention Center, New Orleans, Louisiana, USA
2006	Stephen O. Rothschild, CLU, ChFC, Rothschild & Sale, St. Louis, Missouri 35,781 Meeting at the San Diego Convention Center, San Diego, California, USA

2007	Philip E. Harriman, CLU, ChFC, Lebel and Harriman, Falmouth, Maine 35,662 Meeting at the Colorado Convention Center, Denver, Colorado, USA
2008	James E. Rogers, CLU, CFP, Rogers Group Financial, Vancouver, British Columbia, Canada 39,340 Meeting at the Toronto Convention Centre, Toronto, Ontario, Canada
2009	Walton W. Rogers, CLU, ChFC, W. Rogers and Associates, Annapolis, Maryland .. 31,857 Meeting at Indiana Convention Center, Indianapolis, Indiana, USA
2010	Guy E. Baker, MSFS, PhD, BMI Consulting, Irvine, California 31,142 Meeting at Vancouver Convention Centre, Vancouver, British Columbia, Canada
2011	Julian H. Good, CLU, ChFC, MetLife Creative Financial Solutions, New Orleans, Louisiana 35,908 Meeting at Georgia World Congress Center, Atlanta, Georgia, USA
2012	Jennifer A. Borislow, CLU, Borislow Insurance, Methuen, Massachusetts 37,805 Meeting at Anaheim Convention Center, Anaheim, California, USA
2013	D. Scott Brennan, The Brennan Group, LLC, South Bend, Indiana 38,270 Meeting at the Pennsylvania, Convention Center, Philadelphia, Pennsylvania, USA
2014	Michelle L. Hoesly, CLU, ChFC, Resource 1 Inc., Norfolk, Virginia 42,729 Meeting at the Metro Toronto Convention Center, Toronto, Ontario, Canada
2015	Caroline A. Banks, FPFs, Caroline Banks & Associates, London, England 42,885 Meeting at the Ernest N. Morial Convention Center, New Orleans, Louisiana, USA
2016	Brian D. Heckert, CLU, ChFC, Financial Solutions Midwest, LLC, Nashville, Illinois 49,652 Meeting at the Vancouver Convention Centre, Vancouver, British Columbia, Canada
2017	Mark J. Hanna, CLU, ChFC, Hanna Insurance & Financial Solutions, Inc., Concord, California 62,771 Meeting at Orange County Convention Center, Orlando, Florida, USA
2018	James D. Pittman, CLU, CFP, Insurance Consulting Services Inc., Portland, Oregon 66,684 Meeting at Los Angeles Convention Center, Los Angeles, CA, USA
2019	Ross Vanderwolf, CFP, Rothgard Financial Partners 72,045 Meeting at Miami Beach Convention Center, Miami Beach, Florida, USA
2020	Regina Bedoya, CLU, ChFC, RB Financial Advisors 65,735 Virtual meeting
2021	Ian Green, Dip PFS, Green Financial Advice 91,354 Virtual meeting
2022	Randy L. Scritchfield, CFP, LUTCF, Montgomery Financial Group 85,894 Meeting at The Greater Boston Convention and Visitors Bureau, Boston, Massachusetts, USA
2023	Peggy Tsai, RFP, CCFP, Shin Kong Life Insurance Co 85,849 Meeting at Music City Center, Nashville, Tennessee, USA

*DECEASED

MDRT Executive Staff And Departments

MDRT headquarters is in Park Ridge, Illinois, USA, and employs more than 130 professionals.

Following is a list of Executive Staff:

Chief Executive Officer..... Stephen P. Stahr, CAE
Managing Director..... Barbara A. O'Connor, CAE
Senior Director, Finance..... David Dickhudt
Senior Director, Global Markets..... Gina van Dijk, ECAM
Senior Director, Business Development Nicole Squires
Senior Director, Human Resources..... Laura E. Good, PHR, SHRM-CP
Senior Director, Strategy Smruti Rajagopalan
Senior Director, Information Technology..... Jim Unander, MBA, PMP
Executive Director, MDRT Academy..... Tammy Johnson-Peón
Executive Director,
MDRT Center for Field Leadership Julie Langlie, CMP
Executive Director, MDRT Foundation Michele L. Stauff, CFRE
Director, Leadership
and Guided Development..... Pamela K. Brown, CMP, CAE
Director, Stakeholder Engagement..... Thomas S. Ensign
Director, Facilities..... Austin Hurley, FMP, MCOM
Director, Professional Development..... Jess Jurasz, CMP
Director, Content Development Kathryn Furtaw Keuneke, CAE
Director, Meeting Services..... Jeanne Malone, CMP
Director, Marketing and Communications Don Noverini
Director, IT and PMO Ravi Rooprai, PMP
Director, Digital Experience Wayne Schmeiser

MDRT Contact Information

To interview an MDRT or Executive Committee member, please contact MDRT's Marketing and Communications department at mdrtmarketing@mdrt.org. For additional information about MDRT, visit mdrt.org. To learn more about the MDRT Foundation and ways to contribute, visit mdrtfoundation.org.

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