



## MDRT's global network of financial services professionals meet in Nashville at 2023 Annual Meeting

*Members of the Premier Association of Financial Professionals® discussed best practices and heard inspiring messages while attending networking and educational sessions.*

**PARK RIDGE, III. (June 29, 2023)** – Members of MDRT, the leading international association for financial services and insurance professionals, gathered in Nashville, Tennessee, USA, June 25–28, to advance their careers and learn from fellow members and other multidisciplinary experts at the members-only 2023 Annual Meeting.

Members attended more than 190 sessions during the four-day event, which featured motivational speakers on Main Platform, specific industry knowledge from colleagues at Focus Sessions and various networking opportunities in the ConneXion Zone. Attendance reflected the global aspect of MDRT, with members from 56 countries and territories intermingling to discover new ways of working and establish meaningful connections with colleagues and clients.

“Seeing members from across the globe gather to learn and grow together is what MDRT is all about,” said MDRT President Peggy Tsai, RFP, CCFP. “I’m constantly inspired by the connections made by financial services professionals from different cultures and markets. My time as President has shown me how much we all can learn from one another, regardless of where we call home.”

Main Platform sessions featured inspiring messages from notable speakers like Olympic medalist Chaunté Lowe, poet IN-Q, “Homeless to Harvard” speaker Liz Murray, robotics and health care innovator Keller Rinaudo, paralympic medalist and philanthropist Dylan Alcott and more.

“The connections I have been able to build from my first Annual Meeting seven years ago are connections I still have today,” said MDRT member Brandon Heckert, CFP, AAMS. “These connections are the reason I keep coming back. I like getting to see my friends, and we all learn from one another. I never thought I would have friends from around the world like how MDRT has made possible.”

Attendees like Heckert learned from fellow MDRT members on Main Platform and at Focus Sessions about ways to leverage past experiences to boost their effectiveness as advisors. Examples include Carla Brown, PFPS, explaining how using



MDRT Members at the opening session of the 2023 MDRT Annual Meeting in Nashville, Tennessee.



MDRT First Vice President Gregory B. Gagne speaking on the Main Platform of the 2023 MDRT Annual Meeting.



social media can lead to effective referrals; Pamela J. Sams, CRPC, enlightening the audience on the benefits of behavioral finance; and Juli Y. McNeely, CFP, CLU, sharing how to help a client plan for the retirement they desire beyond the monetary value of their retirement plan.

“MDRT has been and always will be a member-led organization. The Executive Committee makes all decisions based on what is best for MDRT members,” said MDRT First Vice President Gregory B. Gagne, ChFC. “We build on what came before us to provide exceptional tools and enhanced resources that will drive members’ success.”

Gagne, a 24-year MDRT member from Exeter, New Hampshire, USA, spoke on Main Platform Tuesday, June 27, where he was welcomed as the 2024 MDRT President. He shared his hopes for the organization, saying “MDRT will continue to meet you where you are, with targeted communications directing you to the benefits and resources of greatest personal interest and potential impact. We want to help at every step of all MDRT members’ journeys.”

During his year as President, Gagne hopes to connect with members across the globe and ensure they receive resources that help them continue to succeed. Gagne will assume his new position on September 1, after three years of service on the MDRT Executive Committee.

#### **About MDRT**

MDRT (Million Dollar Round Table) The Premier Association of Financial Professionals®, is a global, independent association of the world's leading life insurance and financial services professionals from more than 700 companies in 80 nations and territories. MDRT members demonstrate exceptional professional knowledge, strict ethical conduct and outstanding client service. MDRT membership is recognized internationally as the standard of excellence in the life insurance and financial services business. For more information, please visit [www.mdr.org](http://www.mdr.org).

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