



**MDRT**

The Premier Association of  
Financial Professionals®

Australia

## 2018 MDRT Goals Based on 2017 Production

Following are monthly goals in Australian dollars to keep you on track for the 2018 Million Dollar Round Table, Court of the Table and Top of the Table. Track your progress toward 2018 membership during the 2017 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	11,192	33,575	67,150	22,383	67,150	134,300	19,250	57,750	115,500
February	22,383	67,150	134,300	44,767	134,300	268,600	38,500	115,500	231,000
March	33,575	100,725	201,450	67,150	201,450	402,900	57,750	173,250	346,500
April	44,767	134,300	268,600	89,533	268,600	537,200	77,000	231,000	462,000
May	55,958	167,875	335,750	111,917	335,750	671,500	96,250	288,750	577,500
June	67,150	201,450	402,900	134,300	402,900	805,800	115,500	346,500	693,000
July	78,342	235,025	470,050	156,683	470,050	940,100	134,750	404,250	808,500
August	89,533	268,600	537,200	179,067	537,200	1,074,400	154,000	462,000	924,000
September	100,725	302,175	604,350	201,450	604,350	1,208,700	173,250	519,750	1,039,500
October	111,917	335,750	671,500	223,833	671,500	1,343,000	192,500	577,500	1,155,000
November	123,108	369,325	738,650	246,217	738,650	1,477,300	211,750	635,250	1,270,500
December	<b>134,300</b>	<b>402,900</b>	<b>805,800</b>	<b>268,600</b>	<b>805,800</b>	<b>1,611,600</b>	<b>231,000</b>	<b>693,000</b>	<b>1,386,000</b>



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## 2018 Million Dollar Round Table

(Abridged version. For more detailed information on membership requirements, go to [www.mdr.org](http://www.mdr.org).)

### PRODUCTION CREDIT

#### UNLIMITED 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

#### LIMITED CREDIT

##### 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 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 2018 Round Table will be based on the following production methods:

- **Commission/Fee Method**  
A minimum of USD 95,000 of eligible commissions paid is required. Of this total, a minimum of USD 47,500 of paid commissions (50 percent of the requirement) must come from products listed in the Unlimited Credit category.
- **Premium Method**  
A minimum of USD 190,000 of eligible paid premium is required. Of this total, a minimum of USD 95,000 of premium (50 percent of the requirement) must come from products listed in the Unlimited Credit category.
- **Income Qualification Method**  
A minimum of USD 164,000 in annual gross income from the sale of insurance and financial products is required. A minimum of USD 47,500 must be income from new business generated during the production year. Further, a minimum of USD 47,500 must be derived from income associated with risk-protection products (products eligible for Unlimited Credit under the commission or premium methods). 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 285,000 of eligible commissions paid or USD 570,000 of eligible paid premium is required. At least USD 47,500 of commission or USD 95,000 of premium (50 percent of the entry-level MDRT requirement) must come from products listed in the Unlimited Credit category before an applicant can use any credit from policies listed under the Limited Credit category.
- **Income Method**  
A minimum of USD 492,000 of eligible annual gross income is required. The applicant must meet the minimums of USD 47,500 in new business and USD 47,500 in risk-protection business.

##### 3. Top of the Table

- **Commission & Premium Method**  
A minimum of USD 570,000 of eligible commissions paid or USD 1,140,000 of eligible paid premium. At least USD 47,500 of commission or USD 95,000 of premium (50 percent of the entry-level MDRT requirement) must come from products listed in the Unlimited Credit category before an applicant can use any credit from policies listed under the Limited Credit category.
- **Income Method**  
A minimum of USD 984,000 of eligible annual gross income is required. The applicant must meet the minimums of USD 47,500 in new business and USD 47,500 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 4-7, 2017  
Orlando, Florida, USA

June 24-27, 2018  
Los Angeles, California, USA

##### **\*Top of the Table Annual Meeting**

October 18-21, 2017  
Rancho Palos Verdes, California, USA

*\*Attendance at the MDRT Annual Meeting and Top of the Table Annual Meeting is open to approved members of the 2017 Table and requires payment of separate registration fees.*

##### **\*MDRT Experience and Global Conference**

February 8-10, 2018  
Bangkok, Thailand

*\*The MDRT Experience and Global Conference is open to MDRT members and nonmembers.*