

U.K. financial advisor joins MDRT leadership team

LONDON (September 1, 2025) — [MDRT](#), The Premier Association of Financial Professionals®, appointed London-based financial advisor Simon D. Lister, Dip PFS, an 18-year MDRT member with 18 Court of the Table and 15 Top of the Table qualifications, to serve as Secretary on its 2026 Executive Committee. Lister took office September 1, bringing with him abundant experience as an MDRT volunteer leader and a global perspective to enhance connections among members.

As Secretary, Lister, along with four other Executive Committee leaders, will focus on empowering fellow members to engage across the global MDRT community. Lister and the committee also will prioritize access to exclusive, customized digital content aligned with their unique goals.

The Executive Committee will oversee continued development of the [MDRT Family of Brands](#), which includes the [MDRT Academy](#) for advisors striving to qualify for MDRT membership and the [MDRT Center for Field Leadership](#) for field and home office leaders who want to build an MDRT culture of excellence in their teams.

Lister is an independent financial planner and managing director with ML Financial Associates. He specializes in retirement planning, helping clients build secure financial futures.

Lister found success early in his career as an independent financial advisor through long hours and hard work. Later, other advisors he met raised the bar for what was possible, and he learned that attention to detail and a disciplined approach could unlock new levels of productivity. This openness to adjust and consider new perspectives prepared him to join MDRT's Executive Committee and guide the organization into the future.



Simon D. Lister, Dip PFS, joins MDRT's Executive Committee as Secretary.

"I look forward to collaborating with this talented team to continue enhancing MDRT and encouraging fellow members to expand their global connections," Lister said.

Lister's extensive involvement in MDRT leadership began in 2011, and he has served on an array of committees in various roles. He served as Global Council Member of the 2025 MDRT Annual Meeting Program Development Division. He previously served as Chair of the Main Platform Committee for the 2024 MDRT Annual Meeting, Chair of the Focus Sessions Committee for the 2023 MDRT Annual Meeting, and as Global Council Member and Advisory Board Chair of the Top of the Table Division in 2021. Lister also is a Platinum Knight of the MDRT Foundation and a member of its Inner Circle Society.

About MDRT

Founded in 1927, 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 80 nations and territories and nearly 700 companies. 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 mdrt.org.

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