

2026 MDRT CULTURE OF EXCELLENCE AWARDS: COMPANY VERIFICATION FORM

This company verification form is part of the award application and must be uploaded with the award application on or before **March 13, 2026**
MDRT CENTER FOR FIELD LEADERSHIP

325 West Touhy Avenue, Park Ridge, IL 60068 USA
 Phone: +1 847 692 6378 Website: mdrtcenter.org

ALL APPLICATIONS ARE SUBJECT TO VERIFICATION

INSTRUCTIONS

APPLICANT INSTRUCTIONS

Send this company verification form with your contact information completed to the appropriate official of the company that paid the MDRT credit. The official will verify the applicable data, sign the form, and return it to you. When you receive the signed copy, upload it to your award application ensuring the data matches the data provided in your application. Retain a copy for your records.

COMPANY OFFICIAL INSTRUCTIONS

Verify the production, retention, recruitment, persistency and/or membership criteria for the applicant's agency prepopulated in the sections to the right are accurate. This company verification form must be signed by the official who can verify the MDRT credit attributed to the applicant's agency and should be submitted with the application. **CREDIT MUST BE REPORTED IN U.S. DOLLARS (USD)**. See the second page of this form for eligible credits.

(Complete all information below) **This form must be completed in English.**

MDRT ID Number: _____

Applicant's Name _____

Agency/Partnership/Corporation Name (if applicable) _____

Address _____

City _____ State/Country/Market _____ ZIP/Postal Code _____

Country/City Code or Area Code _____ Tel # _____

Email _____

Is entitled to the data indicated, calculated in accordance with MDRT policies and procedures.

THIS IS TO CERTIFY THAT

**COMPLETED BY COMPANY
OFFICIAL**

All company verification forms must be completed in English.

The undersigned affirms the above agency production, retention, recruitment, persistency and membership data are true and correct to the best of his/her knowledge and belief, and that this business was in force in the stated years. **(*Required field)**

*Print or Type Name of the Company Official _____

*Signature of Company Official _____

*Title _____

Country/Cide Code or Area Code _____ Telephone Ext. _____

*Company Name _____

Country/City Code or Area Code _____ Fax _____

*Street Address _____

*Email _____

*City/State or Prov./ZIP or Postal Code/Country _____

*Date _____

2026 MDRT CULTURE OF EXCELLENCE AWARDS: COMPANY VERIFICATION FORM

This company verification form is part of the award application and must be uploaded with the award application on or before March 13, 2026.

MDRT-ELIGIBLE PRODUCTION CREDIT

RISK-PROTECTION CREDIT	Products From Life Insurance Companies	Commission/Fee Credit	Premium Credit
	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	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 CREDIT	Products	Commission/Fee Credit	Premium Credit
	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	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	6% of new money invested
	Financial planning fees/fees for advice	100% of the net fee	100% of the gross fee

PRODUCTION REQUIREMENT – Commission and Premium

Award applicants must qualify exclusively with either commission credit OR premium credit; the two types of credit cannot be combined.