



MDRT®



2026 OUTLOOK





DEAR FRIENDS OF MDRT

The 2026 MDRT Outlook provides an overview of the organization and showcases what it means to be a member of The Premier Association of Financial Professionals®.

Imagine being part of a limitless mission – a place where your hard work, passion and purpose intersect to create a lasting impact on others. That is who we are.

Representing more than 80 nations and nearly 700 companies, MDRT members are committed to our internationally recognized standard of excellence, providing consistent value to their clients and serving them with the highest standards of ethics, knowledge, service and productivity.

MDRT offers countless opportunities for members to gain the knowledge and tools needed to succeed. In turn, they can give clients sound financial advice, while enhancing their expertise and advancing in the profession.

MDRT continues to deliver events, connections and content that empower members to grow personally and professionally, helping them deliver key solutions for clients and enjoy a healthy work-life balance in accordance with the Whole Person concept.

Financial advisors receive support at all stages of their careers through the MDRT Family of Brands, which includes the MDRT Academy, MDRT and the MDRT Center for Field Leadership.

The value of MDRT membership depends on the depth and quality of our engagement. Today, our members are maximizing their return on involvement to create everlasting impacts.

Together, we proudly serve others as MDRT – a global force for good.

Thank you for your continued involvement with and support of MDRT.

Sincerely,

John F. Nichols, MSM, CLU

2026 MDRT President

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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 2026 membership, based on 2025 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	PREMIUM	INCOME
USD 87,000 MDRT	USD 174,000 MDRT	USD 151,000 MDRT
USD 261,000 Court of the Table	USD 522,000 Court of the Table	USD 453,000 Court of the Table
USD 522,000 Top of the Table	USD 1,044,000 Top of the Table	USD 906,000 Top of the Table

MDRT FACTS (as of July 1, 2025)

Members.....	90,365
Companies represented.....	694
Nations and territories represented.....	84
MDRT.....	75,942
Court of the Table.....	10,157
Top of the Table.....	4,266

TOP 10 MEMBER MARKETS

China	14,945
Japan.....	12,884
Hong Kong, China	11,233
Chinese Taiwan	9,169
Singapore	6,424
United States	6,046
Thailand	5,419
India.....	4,570
Republic of Korea	3,708
Malaysia	2,957

COMPANY RANKINGS

Company partners play a key role in supporting MDRT's mission to maintain its status as The Premier Association of Financial Professionals®.

2025 TOP 10 – TOTAL MEMBERSHIP GROWTH

Increases in total membership growth are measured over the previous year.

Cathay Life Insurance Co. Ltd., Chinese Taiwan	1,108
AIA Singapore Private Ltd., Singapore	471
Fubon Life Insurance Co., Chinese Taiwan.....	444
Manulife (International) Ltd. Hong Kong, Hong Kong, China	358
Sony Life Insurance Co., Japan	340
Tata AIA Life-India, India	287
AIA International Ltd., Hong Kong, China.....	247
Kyobo Life Insurance Co. Ltd., Republic of Korea.....	212
Shinhan Life, Republic of Korea.....	122
AXA China Region Insurance Co. Ltd., Hong Kong, China	80

2025 TOP 10 - HIGHEST MEMBER RETENTION

The total number of retained members is measured from the previous year.

AIA International Ltd., Hong Kong, China	2,798
AIA-China, China	2,489
AIA Co. Ltd., Thailand.....	2,450
Sony Life Insurance Co., Japan	1,727
Prudential Hong Kong Ltd., Hong Kong, China.....	1,674
Mingya Insurance Brokers Ltd., China	1,515
Prudential Life Insurance Co. Ltd., Japan	1,350
Tata AIA Life-India, India	1,316
AIA Singapore Private Ltd., Singapore	1,289
Cathay Life Insurance Co. Ltd., Chinese Taiwan	986

2025 TOP 10 – HIGHEST MEMBER LONGEVITY

The total number of members with five to nine years of membership.

AIA-China, China	1,200
AIA Co. Ltd., Thailand.....	1,106
AIA International Ltd., Hong Kong, China	1,085
Prudential Hong Kong Ltd., Hong Kong, China.....	984
Sony Life Insurance Co., Japan	617
AIA Singapore Private Ltd., Singapore	570
Mingya Insurance Brokers Ltd., China	528
Cathay Life Insurance Co. Ltd., Chinese Taiwan	522
Manulife (International) Ltd., Hong Kong, Hong Kong, China	497
Prudential Assurance Company Singapore (PTE) Ltd., Singapore	441

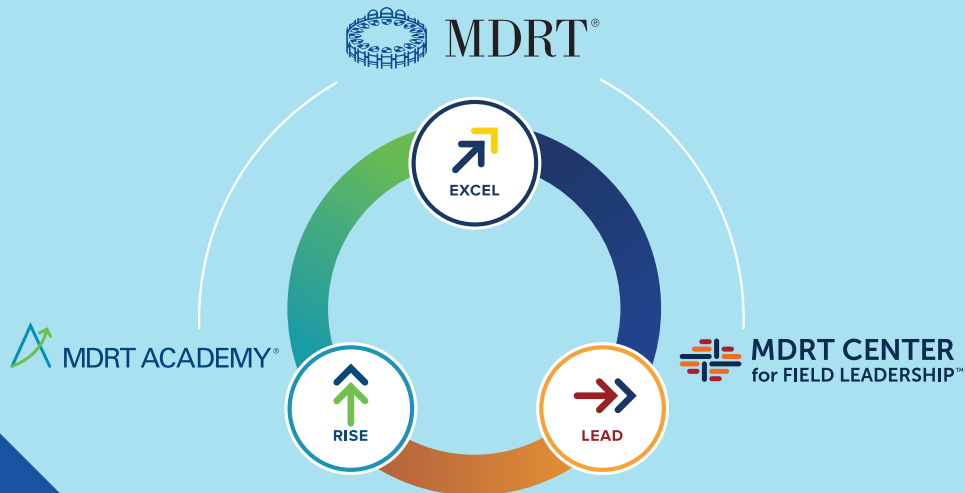
These charts reflect the top 10 rankings for each category. The complete lists for the 2025 Company Rankings can be viewed at mdrt.org/about-mdrt/for-companies.

CORE VALUES SPANNING BORDERS

MDRT believes in sustainable core values, regardless of time or border. MDRT members serve their communities by adhering to strict professional and ethical standards while they embody the Whole Person concept to achieve balanced lifestyles. The valuable benefits MDRT membership offers financial services companies are multiplied with each qualifying member within the organization. Advisors who are MDRT members continue to develop their skills and improve client relationships, enhancing the company's reputation, overall business growth and success. 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.

A FAMILY LIKE NO OTHER

The MDRT Family of Brands, comprising the MDRT Academy, MDRT and the MDRT Center for Field Leadership, serves financial services professionals at every stage of their careers. The MDRT Academy provides advisors with next-level knowledge to help them reach and maintain MDRT qualification. MDRT helps advisors hone their skills while growing their businesses. The MDRT Center for Field Leadership empowers field and home office leaders to pursue lifelong learning and build an MDRT Culture of Excellence in their teams.



An association for financial professionals working toward MDRT-level production

Accessible anytime, anywhere through a mobile app and website

More than 1,200 pieces of content, including articles, videos, podcast episodes, Webcasts and Performance Guides, offering MDRT-approved best practices

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, MDRT mentors 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 businesses 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 MDRT Culture of Excellence Awards

MDRT CODE OF ETHICS

Compliance with the MDRT Code of Ethics promotes the highest standards of client service to benefit the public and the financial services profession.

THEREFORE, MEMBERS SHALL:

- 1 Always place the best interests of their clients above their own direct and indirect interests.
- 2 Maintain the highest standards of professional competence by seeking to maintain and improve professional knowledge, skills and competence.
- 3 Hold in strictest confidence and consider as privileged all business and personal information pertaining to their clients' affairs.
- 4 Make full and adequate disclosure of all facts necessary to enable clients to make informed decisions.
- 5 Maintain personal conduct which will reflect favorably on the insurance and financial services profession and the Million Dollar Round Table.
- 6 Determine that any replacement of an insurance or financial product must be beneficial for the client.
- 7 Abide by and conform to all provisions of the laws and regulations in the jurisdictions in which they 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

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.

MDRT FOUNDATION



The MDRT Foundation Board of Trustees

MISSION

The MDRT Foundation gives to charitable organizations worldwide, demonstrating the generosity, service and impact of MDRT members.

VISION

To empower MDRT members to make a difference in their communities around the world.

VALUES

To engage all members through global reach and local impact, the MDRT Foundation must

- Lead with love, hope and the joy of giving
- Embrace and uphold inclusivity
- Foster connection, empowerment and service
- Steward all gifts with care, diligence and wisdom

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.



MADA Community Center – Canada received a USD 5,000 grant for its meals-on-wheels program to provide 10,000 fresh meals a week to those in need.



The Embracing Project received a USD 50,000 grant for its programs to support youth survivors of sexual violence and exploitation.

“This grant helped establish a new level of safety and care for the resident students. I am eternally grateful to my MDRT friends around the globe.”

– Barry McBride, CLU, AEP,
MDRT member

2025 MDRT ANNUAL MEETING

Seva Foundation is a global, nonprofit eye care organization that works with local communities around the world to develop self-sustaining programs that preserve and restore sight. MDRT members raised over USD 275,000.

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



MDRT members wear cataract simulator glasses to understand the challenges of seeing with cataracts.

WHAT IS COMING UP

MDRT EVENTS

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

MDRT ANNUAL MEETING

MDRT ANNUAL MEETING

MDRT's pinnacle event for all members, it draws thousands together each year for a transformative learning experience to celebrate achievement and stimulate growth through networking and sharing among the best in the business.

June 7-10, 2026
Anaheim, California, USA

MDRT GLOBAL CONFERENCE

With an emphasis on subject matter specific to the Asia-Pacific region, the MDRT Global Conference brings members together to recognize and celebrate their achievements, utilizing culturally resonate experiences that deepen engagement from member to company.

August 23-26, 2026
Sydney, Australia



TOP OF THE TABLE ANNUAL MEETING

This exclusive meeting is the gateway for Top of the Table members to discover how to advance already high levels of success and share business expertise while forging new relationships that last a lifetime.

October 6-9, 2026
Palos Verdes, California, USA

MDRT EDGE

This experiential business planning meeting is designed to Engage, Develop, Grow and Empower U.S. and Canadian members, while leveraging cutting-edge learning formats to build valuable personal and professional networks.

November 9-11, 2026
Boston, Massachusetts, USA



The complete list of MDRT meetings can be viewed at mdrt.org/attend.

MDRT'S RESOURCES ACROSS PLATFORMS

Members can 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.

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's mobile-friendly website, mdrt.org.

Events: 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 soundcloud.com/mdrt-podcast.

MDRT Blog: 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. New posts are uploaded every week at mdrtblog.org.

MDRT Connect e-newsletters: Sent on a twice-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 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 members better position themselves when working with their clients and prospects. The toolkit includes news releases, member logos, tips for self-promotion and media engagement to promote MDRT membership in local communities. MDRT members can view all toolkit materials by logging in to mdrt.org.

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. A complete list of infographics and studies can be viewed at <https://bit.ly/3H698BY>.

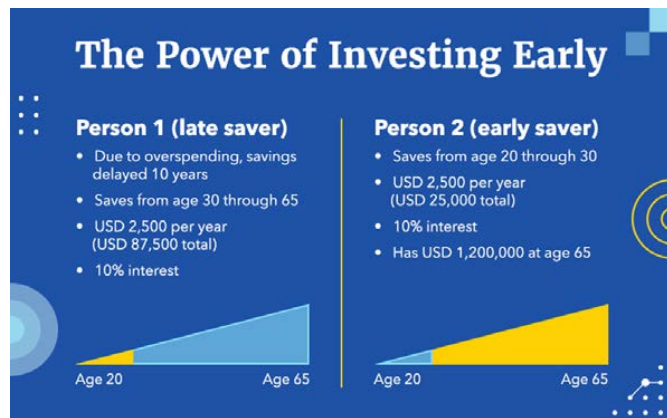
MDRT Media Program: MDRT members frequently contribute to various external trade publications like InsuranceNewsNet, Advisor News, Advisor Today, The Independent, Perspectives and more to share their insights with the wider industry. If you are interested in learning more about the media program, please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

MDRT IN THE MEDIA | CONNECTING MEMBERS AND EMERGING TRENDS

New and developing industry trends are calls to action for all financial services professionals. By connecting with and gaining insight from their MDRT peers, members can advance their careers and make a positive impact on clients' financial livelihoods.

Financial literacy among the public and your clients

It's no surprise that social media and the inappropriate use of artificial intelligence (AI) has contributed to the rise of financial misinformation and investment illiteracy, with many consumers disconnected from the basics of finance and struggling to understand the facts. Recent MDRT studies of consumers in Japan, Singapore and the U.S., though, found that having a financial advisor is strongly correlated with better financial literacy. In the U.S., 78.5% of survey respondents with advisors rated their own financial literacy as good or excellent, compared with 49.8% of survey respondents without advisors. MDRT members seek to fill the gap by educating their clients and the general public alike to diminish potential harm from misinformation. To meet this goal, MDRT Top of the Table member Tim Daniel Clairmont, MSFS, LACP, outlined an end-of-year checklist in CNBC while MDRT Top of the Table member William J. Rossi, CFP, ChFC, wrote in Fortune that advisors should take extra care when working with millennial or Gen Z clients due to some of their unique challenges.



This graphic promoting early retirement savings was provided by William J. Rossi, CFP, ChFC, for his article in Fortune on working with millennial and Gen Z clients.

Advisors and AI

The AI era is here and revolutionizing the way advisors handle daily administrative tasks. But it's not just industry experts who think so. A recent MDRT survey found that 70.8% of consumers who have an advisor say they think advisors should use AI for at least one professional purpose. MDRT Court of the Table member Kyler J. Spencer, CFP, shared in Advisor Magazine that AI presents new opportunities to enhance client service paired with proper training and testing.

For those unsure where to start, MDRT Top of the Table member Panos Leledakis, LUTCF, suggested in InsuranceNewsNet to start with clerical functions, like research or AI chatbots, aligning with the results of the MDRT survey.



This was one of the most important findings from the 2025 MDRT U.S. public opinion survey on consumer feedback about advisors using AI.

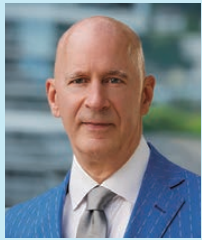
Thinking outside the box when it comes to investments

Clients are searching for less risky ways to invest funds. This often takes them beyond stock market investments to real estate, annuities, CDs and more. The goal is to find avenues of income that grow capital amid high inflation, rising interest rates and policy changes, a concept that MDRT Top of the Table member Brandon J. Wellman, CFP, RICP, reiterates in InsuranceNewsNet. He has learned that clients want to find ways to diversify portfolios beyond the traditional sense, and doing so requires diligence and education from advisors. Alternative investments can be shrouded in mystery for those unfamiliar with the landscape. Careful consideration of the client's needs and establishing a balanced investment portfolio is key to success.

PASSIONATE LEADERS

MDRT EXECUTIVE COMMITTEE

MDRT is governed by a five-member Executive Committee duly elected each year by the membership. The 2026 MDRT Executive Committee includes:



John F. Nichols, MSM, CLU
President

John F. Nichols, MSM, CLU, is a 25-year MDRT member with 20 Court of the Table and 18 Top of the Table qualifications. Nichols has served in multiple roles on the MDRT Executive Committee since 2023.

Nichols served as Global Council Member of MDRT's Membership Division in 2020 and Chair of its Bylaws and Ethics Committee in 2019. In 2022, he served as President of the MDRT Foundation, for which he is a Royal Order Excalibur Knight and a member of its Inner Circle Society.

Nichols is the founder of Nichols Consulting LLC, a disability insurance benefits practice.



Carol Kheng, ChFC
Immediate Past President

Carol Kheng, ChFC, is a 27-year MDRT member with five Court of the Table and four Top of the Table qualifications.

Kheng has served in multiple roles on the MDRT Executive Committee since 2022. She previously served as Divisional Vice President for Global Conference Program General Arrangements in 2019 and for MDRT's Member Resources - Practice Management Division in 2009. Kheng also has served on the Board of Trustees of the MDRT Foundation, for which she is a Diamond Knight.

Kheng is a master financial consultant with Prudential Assurance Company Singapore, where she was the founding member and chairperson of its MDRT Club.

Clay Gillespie, CFP, CLU, is a 24-year MDRT member with 22 Court of the Table and 21 Top of the Table qualifications.

An Excalibur Knight of the MDRT Foundation, Gillespie served as Global Council Member of MDRT's Finance Division in 2023 and as Top of the Table Global Council Member and Advisory Board Chair in 2019. He was Captain of the 2015 MDRT Annual Meeting Focus Sessions Committee and has served as Chair of several committees in the Top of the Table Division.

Gillespie is a financial advisor, portfolio manager and managing director with RGF Integrated Wealth Management.

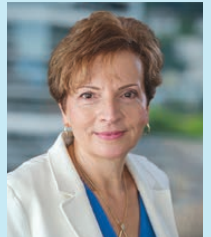


Clay Gillespie, CFP, CLU
First Vice President

Aurora L. Tancock, CFP, FLMI, is a 24-year MDRT member with 14 Court of the Table and five Top of the Table qualifications.

Tancock served as Chair of the Focus Sessions Committee for the 2023 MDRT Global Conference and as Global Council Member for MDRT's Finance Division in 2020. She also has served on the Board of Trustees of the MDRT Foundation, for which she is a Diamond Knight and a member of its Inner Circle Society.

Tancock is the founder of Aurora Tancock Financial Services Inc.



Aurora L. Tancock, CFP, FLMI
Second Vice President

Simon D. Lister, Dip PFS, is an 18-year MDRT member with 18 Court of the Table and 15 Top of the Table qualifications.

Lister 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. He also is a Platinum Knight of the MDRT Foundation and a member of its Inner Circle Society.

Lister is an independent financial planner and managing director with ML Financial Associates.



Simon D. Lister, Dip PFS
Secretary

2026 MDRT GLOBAL COUNCIL

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

Adam McCann, CFP, DFP	Member Resources Best Practices Division 1
Veronica Bernal Perez, FSCP.....	Member Resources Best Practices Division 2
Suet Yee Michelle Kwok	Member Resources Best Practices Division 3
Lim Yee Von	Member Resources Best Practices Division 4
Brian W. Burgess	Membership Communications Division 1
Naoki Masuda	Membership Communications Division 2
Ted Rusinoff	Membership Communications Division 3
Benson Ni.....	Membership Communications Division 4
Dana Mitchell, CFP, CLU	Annual Meeting Program Development Division
Hyoun Pio Park, MBA.....	Annual Meeting Program General Arrangements Division
Tristan Hartey, Dip FA, BA (Hons)	Global Conference Program Development Division
Ng Chi Lap.....	Global Conference Program General Arrangements Division
Jennifer P. Mann, MBA, CFP	Finance Division
Arlyn Tiong Tan, MBA, FChFP.....	Membership Division
Bryson Milley, CFP, CIM.....	Top of the Table Division

MDRT PAST PRESIDENTS

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

*DECEASED

MDRT PAST PRESIDENTS

YEAR	TOTAL MEMBERSHIP
1947	*Harold S. Parsons, The Travelers726 Meeting at the New Ocean House, Swampscott, Massachusetts, USA
1948	*Paul H. Dunnavan, CLU, Canada Life.....829 Meeting at French Lick Springs, French Lick, Indiana, USA
1949	*Paul W. Cook, CLU, Mutual Benefit Life824 Meeting at the Netherland Plaza, Cincinnati, Ohio, USA
1950	*Theodore Widing, CLU, Provident Mutual790 Meeting at Haddon Hall, Atlantic City, New Jersey, USA
1951	*John O. Todd, CLU, Northwestern Mutual949 Meeting at the Hotel Del Coronado, Coronado, California, USA
1952	*Walter N. Hiller, CLU, Penn Mutual1,065 Meeting at the Mount Washington, Bretton Woods, New Hampshire, USA
1953	*William T. Earls, CLU, Mutual Benefit Life1,240 Meeting at The Greenbrier, White Sulphur Springs, West Virginia, USA
1954	*G. Nolan Bearden, New England Life1,492 Meeting at the Hotel Del Coronado, Coronado, California, USA
1955	*George B. Byrnes, CLU, New England Life.....1,557 Meeting at The Greenbrier, White Sulphur Springs, West Virginia, USA
1956	*Arthur F. Priebe, CLU, Penn Mutual2,013 Meeting on the Kungsholm to Bermuda
1957	*Howard D. Goldman, CLU, Northwestern Mutual2,438 Meeting at The Greenbrier, White Sulphur Springs, West Virginia, USA
1958	*William D. Davidson, CLU, Equitable-New York2,987 Meeting at the Banff Hotel, Banff, Alberta, Canada
1959	*Adon N. Smith II, CLU, Northwestern Mutual.....2,688 Meeting at the Americana, Bal Harbour, Florida, USA
1960	*Robert S. Albritton, CLU, Provident Mutual3,040 Meeting at the Hilton Hawaiian Village, Honolulu, Hawaii, USA
1961	*James B. Irvine Jr., CLU, Northwestern Mutual2,932 Meeting at the Americana, Bal Harbour, Florida, USA
1962	*Lester A. Rosen, CLU, Union Central3,122 Meeting at The Queen Elizabeth, Montreal, Quebec, Canada
1963	*Daniel H. Coakley, New York Life.....3,420 Meeting on the Kungsholm to Bermuda
1964	*Alfred J. Lewallen, CLU, Mutual Benefit Life.....3,202 Meeting at The Diplomat, Hollywood, Florida, USA
1965	*Iram H. Brewster, Phoenix Mutual3,636 Meeting at The Broadmoor, Colorado Springs, Colorado, USA
1966	*Donald Shepherd, John Hancock4,076 Meeting at the Statler Hilton, Boston, Massachusetts, USA

1967	*Frank E. Sullivan, CLU, Mutual Benefit Life4,616 Meeting at Congress Hall, Lucerne, Switzerland
1968	*Sadler Hayes, Penn Mutual.....5,078 Meeting at the Masonic Memorial Temple, San Francisco, California, USA
1969	*Stanley S. Watts, CLU, Equitable-New York5,689 Meeting at The Diplomat, Hollywood, Florida, USA
1970	*John H. Ames, CLU, Mutual Benefit Life6,675 Meeting at the Hilton Hawaiian Village, Honolulu, Hawaii, USA
1971	*Richard G. Bowers, CLU, New York Life7,589 Meeting at The Washington Hilton, Washington, D.C., USA
1972	*James B. Longley, CLU, New England Life8,361 Meeting at The Queen Elizabeth, Montreal, Quebec, Canada
1973	*Henry F. McCamish Jr., CLU, MassMutual.....9,587 Meeting at The Seattle Center, Seattle, Washington, USA
1974	*C. Robinson Fish III, CLU, Northwestern Mutual10,987 Meeting at the Fontainebleau, Miami Beach, Florida, USA
1975	*Jack Peckinpaugh, CLU, ChFC, Indianapolis Life12,422 Meeting at the Masonic Memorial Temple, San Francisco, California, USA
1976	*Rulon E. Rasmussen, CLU, New York Life.....11,804 Meeting at The Hynes Auditorium, Boston, Massachusetts, USA
1977	*Marshall I. Wolper, CLU, Equitable12,757 Meeting at the Atlanta Civic Center, Atlanta, Georgia, USA
1978	*Jack L. McKewen, CLU, Fidelity Mutual.....14,742 Meeting at the Blaisdell Center, Honolulu, Hawaii, USA
1979	*Paul L. Oliver Jr., CLU, Prudential of America.....17,205 Meeting at McCormick Place, Chicago, Illinois, USA
1980	*Millard J. Grauer, CLU, Equitable17,406 Meeting at The Rivergate, New Orleans, Louisiana, USA
1981	*Clune J. Walsh Jr., CLU, Walsh Financial Group17,581 Meeting at Radio City Music Hall, New York, New York, USA
1982	*Stanley Liss, CLU, New York Life17,737 Meeting at the Atlanta Civic Center, Atlanta, Georgia, USA
1983	Jack B. Turner, CLU, ChFC, Jack B. Turner and Associates.....17,679 Meeting at the Dallas Convention Center, Dallas, Texas, USA
1984	*Paul R. Buckley, CLU, The Buckley Group18,964 Meeting at Radio City Music Hall, New York, New York, USA
1985	*Ron D. Barbaro, North American Life, Toronto21,722 Meeting at the San Francisco Civic Auditorium, San Francisco, California, USA
1986	*Frank Friedler Jr., CLU, Home Life20,598 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..... 17,051 Meeting at McCormick Place, Chicago, Illinois, USA
1988	Arlen I. Prentice, CLU, ChFC, Kibble and Prentice 16,944 Meeting at the Atlanta Civic Center, Atlanta, Georgia, USA
1989	G. Carey Hauenstein, CLU, State Mutual of America..... 16,792 Meeting at the Metro Toronto Convention Centre, Toronto, Ontario, Canada
1990	*David H. Hilton, CLU, ChFC, Northwestern Mutual Life..... 16,393 Meeting at the San Francisco Civic Auditorium, San Francisco, California, USA
1991	Seymour Petrovsky, CLU, Business Men's Assurance..... 16,297 Meeting at the New Orleans Convention Center, New Orleans, Louisiana, USA
1992	William T. O'Donnell, Schwarz Brothers Benefits..... 15,957 Meeting at McCormick Place, Chicago, Illinois, USA
1993	Charles D. Marks, CLU, ChFC, Prudential of America..... 15,721 Meeting at the Hynes Convention Center, Boston, Massachusetts, USA
1994	*Lyle L. Blessman, The Blessman Group 15,686 Meeting at the Dallas Convention Center, Dallas, Texas, USA
1995	Robert B. Plybon, CLU, ChFC, Plybon & Associates..... 15,703 Meeting at the Metro Toronto Convention Centre, Toronto, Ontario, Canada
1996	Walter G. Schnee III, Phoenix Life 18,784 Meeting at the Anaheim Convention Center, Anaheim, California, USA
1997	John W. Cruikshank III, CLU, Northwestern Mutual 18,815 Meeting at the Atlanta Civic Center, Atlanta, Georgia, USA
1998	Gene L. Mahn, CLU, ChFC, MassMutual..... 19,182 Meeting at McCormick Place, Chicago, Illinois, USA
1999	*Reginald N. Rabjohns, CLU, ChFC, Secure Futures..... 21,262 Meeting at Ernest N. Morial Convention Center, New Orleans, Louisiana, USA
2000	Brian H. Ashe, CLU, Brian Ashe & Associates 23,341 Meeting at Bill Graham Civic Auditorium, San Francisco, California, USA
2001	Tony Gordon, Independent, Bristol 25,037 Meeting at Metro Toronto Convention Centre, Toronto, Canada
2002	Marvin H. Feldman, CLU, ChFC, Feldman Financial Group 28,282 Meeting at Gaylord Opryland Resort and Convention Center, Nashville, Tennessee, USA
2003	*Richard H. Sullenger, The Sullenger Financial Group..... 27,665 Meeting at Paris and Bally's Hotel and Casino, Las Vegas, Nevada, USA
2004	George B. Pickett, J.D., CLU, Pickett Bradford & Associates 29,652 Meeting at the Anaheim Convention Center, Anaheim, California, USA
2005	Adelia C. Chung, CLU, ChFC, Spectrum Wealth Management LLC..... 33,297 Meeting at the Ernest N. Morial Convention Center, New Orleans, Louisiana, USA
2006	Stephen O. Rothschild, CLU, ChFC, Rothschild & Sale..... 35,781 Meeting at the San Diego Convention Center, San Diego, California, USA

2007	Philip E. Harriman, CLU, ChFC, Lebel and Harriman LLP 35,662 Meeting at the Colorado Convention Center, Denver, Colorado, USA
2008	James E. Rogers, CLU, CFP, James E. Rogers Ltd 39,340 Meeting at the Toronto Convention Centre, Toronto, Ontario, Canada
2009	Walton W. Rogers, CLU, ChFC, W. Rogers and Associates 31,857 Meeting at Indiana Convention Center, Indianapolis, Indiana, USA
2010	Guy E. Baker, MSFS, Ph.D., BMI Consulting 31,142 Meeting at Vancouver Convention Centre, Vancouver, British Columbia, Canada
2011	Julian H. Good Jr., CLU, ChFC, Good Financial Group LLC 35,908 Meeting at Georgia World Congress Center, Atlanta, Georgia, USA
2012	Jennifer A. Borislow, CLU, Borislow Insurance Agency 37,805 Meeting at Anaheim Convention Center, Anaheim, California, USA
2013	D. Scott Brennan, The Brennan Group, LLC 38,270 Meeting at the Pennsylvania Convention Center, Philadelphia, Pennsylvania, USA
2014	Michelle L. Hoesly, CLU, ChFC, Resource 1 Inc. 42,729 Meeting at the Metro Toronto Convention Centre, Toronto, Ontario, Canada
2015	Caroline A. Banks, FPFs, Caroline Banks & Associates Ltd. 42,885 Meeting at the Ernest N. Morial Convention Center, New Orleans, Louisiana, USA
2016	Brian D. Heckert, CLU, ChFC, Financial Solutions Midwest LLC..... 49,652 Meeting at the Vancouver Convention Centre, Vancouver, British Columbia, Canada
2017	Mark J. Hanna, CLU, ChFC, Hanna Insurance & Financial Solutions Inc..... 62,771 Meeting at Orange County Convention Center, Orlando, Florida, USA
2018	James D. Pittman, CLU, CFP, Insurance Consulting Services Inc..... 66,684 Meeting at Los Angeles Convention Center, Los Angeles, California, 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, Shin Kong Life Insurance Co..... 85,849 Meeting at Music City Center, Nashville, Tennessee, USA
2024	Gregory B. Gagne, ChFC, Affinity Investment Group..... 95,033 Meeting at Vancouver Convention Centre, Vancouver, British Columbia, Canada

*DECEASED

MDRT EXECUTIVE STAFF AND DEPARTMENTS

MDRT headquarters is in Park Ridge, Illinois, USA, and employs more than 150 professionals.

Following is a list of Executive Staff:

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

MDRT CONTACT INFORMATION

If your company or its members would like to create co-branded marketing collateral or member merchandise, please contact the MDRT Marketing and Communications department for approval 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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