



# 2023 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 15, 2023**.

MDRT GLOBAL SERVICES

325 West Touhy Avenue, Park Ridge, IL 60068 USA

Phone: +1 847 692 6378 Website: mdrtps.org

**ALL APPLICATIONS ARE SUBJECT TO VERIFICATION**

<b>INSTRUCTIONS</b>	<p><b>APPLICANT INSTRUCTIONS</b></p> <p>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 enter the applicable data, sign the company verification form, and return it to you. When you receive the signed copy, upload it to your award application. Retain a copy for your records.</p>
	<p><b>COMPANY OFFICIAL INSTRUCTIONS</b></p> <p>Verify the production, retention, recruitment and/or persistency for the applicant's agency and enter them in the sections to the right. 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. <b>CREDIT MUST BE REPORTED IN U.S. DOLLARS (USD)</b>. See the second page of this form for eligible credits.</p>

<b>THIS IS TO CERTIFY THAT</b>	(Please complete all information requested) <u>All company verification forms must be completed in English.</u>
	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.	

<b>PRODUCTION CRITERIA</b>	<b>MUST BE CONVERTED TO U.S. DOLLARS (USD)</b> rounded to the nearest whole dollar <b>based on the official MDRT conversion factor</b> (divide local currency by the conversion factor). <small>See <a href="https://mdrtps.org/media/2022-and-2023-MDRT-Conversion-Factor.pdf">https://mdrtps.org/media/2022-and-2023-MDRT-Conversion-Factor.pdf</a> for conversion factors.</small>
	<b>AGENCY COMMISSION</b>
	2021 (USD) _____ 2022 (USD) _____
	-OR- <b>AGENCY PREMIUM</b>
	2021 (USD) _____ 2022 (USD) _____

<b>RETENTION CRITERIA</b>	<b>NUMBER OF AGENTS IN APPLICANT'S AGENCY AS OF DECEMBER 31, 2021:</b> TOTAL: _____
	<b>NUMBER OF THE SAME AGENTS RETAINED IN THE APPLICANT'S AGENCY FROM DECEMBER 31, 2021 UNTIL DECEMBER 31, 2022:</b> TOTAL RETAINED: _____
	<i>Any agents maintained within the company but moved into another agency due to "spin off" may be counted toward a leader's annual agent retention.</i>

<b>RECRUITMENT CRITERIA</b>	<b>TOTAL NUMBER OF AGENTS IN APPLICANT'S AGENCY AS OF DECEMBER 31, 2021:</b> TOTAL: _____
	<b>TOTAL NUMBER OF NEW AGENTS HIRED IN THE APPLICANT'S AGENCY IN 2022:</b> TOTAL HIRED: _____

<b>PERSISTENCY CRITERIA</b>	<b>TOTAL NUMBER OF POLICIES IN THE APPLICANT'S AGENCY THAT REACHED THE 13<sup>TH</sup> MONTH IN 2022:</b> TOTAL: _____
	<b>TOTAL NUMBER OF POLICIES REACHING THE 13<sup>TH</sup> MONTH IN 2022 THAT WERE RETAINED:</b> TOTAL RETAINED: _____

**QUALIFICATION CRITERIA PERIODS ARE BASED ON CALENDAR YEARS, BEGINNING ON JANUARY 1 AND ENDING ON DECEMBER 31 OF THE RESPECTIVE YEAR.**

<b>COMPLETED BY COMPANY OFFICIAL</b>	<u>All company verification forms must be completed in English.</u>	
	The undersigned affirms the above agency production, retention, recruitment and persistency 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. <b>(*Required field)</b>	
	*Print or Type Name of the Company Official _____	*Signature of Company Official _____
	*Title _____	Country/City 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 _____

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### MDRT-ELIGIBLE PRODUCTION CREDIT

	Products From Life Insurance Companies	Commission/Fee Credit	Premium Credit
<b>RISK-PROTECTION CREDIT</b>	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 <u>in excess of</u> 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

	Products	Commission/Fee Credit	Premium Credit
<b>OTHER CREDIT</b>	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.