

MDRT®
ANNUAL MEETING
2012
ANAHEIM

ANAHEIM

MEET US IN ANAHEIM

With a range of activities and attractions nearby, make your time in Anaheim memorable. You'll be conveniently close to popular destinations like Disneyland, championship golf and beautiful coastlines. If you want to build time into your stay, you can explore California's South Coast wine region and the vibrant mix of cities within Orange County.

*For information about what to see and do in Anaheim,
visit www.mdrt.org/2012am.*



PROGRAM HIGHLIGHTS

The 2012 Annual Meeting is your source to discover new ideas for practice management, marketing and sales strategies. This year you'll find more member speakers on Main Platform with stories of inspiration and motivation that will surely reinvigorate your success as a producer and as an individual. The excitement begins Saturday, June 9 with two Pre-Meeting Workshops and concludes with the Party on the Platform closing celebration.

Three Days of Main Platform Programming

Monday, June 11 and Tuesday, June 12 from 8-11:30 a.m. and from 1:30-5 p.m. on Wednesday, June 13.

Dynamic presentations from renowned business speakers will give insight into future trends and offer practical information for managing your business, creating client loyalty and increasing sales.

Annual Meeting speakers were still being confirmed at the time of printing. They will be listed on the 2012 Annual Meeting website as they are finalized. For the latest speaker information go to <http://www.mdr.org/2012AM>.

54 Professional Development Focus Sessions

Monday, June 11 and Tuesday, June 12 from 2-5 p.m. and from 9-11:30 a.m. on Wednesday, June 13.

Multiple presentations will be offered each day in these Focus Session topic categories: Marketing, Practice Management, Protection and Risk Management, Retirement Planning and Wealth Management, Sales Strategies, and Whole Person.

Hear from top industry speakers on how to enhance your professional and personal life. Topics will include:

Make the Leap: Smooth Transitions
From Commissions to Fees

Create and Lead a 21st-Century Practice

Gold Rush 2012: Prospecting for Success

Think Before You Buy: Assessing
Your Technology Needs

Marketing Strategies for
Every Aspect of Your Practice

How to Convert Client Anxiety About
Risk Into Business-Building Strategies

21st-Century Protection Sales — The Critical Issues

Why R.I.S.K. It: Addressing Six Retirement Risks

Pre-Meeting Workshops

Saturday, June 9, 1-4 p.m. (Prepaid ticketed events)

Add tremendous value to your overall Annual Meeting experience by arriving in Anaheim early to attend a pre-meeting workshop of your choice. Top industry coaches will provide insights into topics that can enhance your practice, including successful sales strategies and business management. Additional cost: USD 25

Speakers for the pre-meeting workshop sessions were still being confirmed at the time of printing. Speakers will be listed on the 2012 Annual Meeting website, www.mdr.org/2012AM, as they are finalized.

Idea Exchanges

Monday, June 11 and Tuesday, June 12, 3:30-4:30 p.m. and Wednesday, June 13, 10:30-11:30 a.m.

The Idea Exchanges are back! The 2012 Annual Meeting will feature three opportunities for attendees to share tips, strategies and solutions to overcome professional and personal challenges. Each Idea Exchange will be facilitated by a highly successful MDRT member and focus on a single topic: Sales Ideas, Practice Management or Whole Person. Attend one or all three. These popular sessions were standing room only at the 2011 Annual Meeting, so come early.

SPECIAL SESSIONS

SUNDAY, JUNE 10

Special Session speakers were still being confirmed at the time of printing. Special Session speakers will be listed on the 2012 Annual Meeting website as they are confirmed. Visit www.mdr.org/2012AM.

11 a.m.-1:30 p.m.

Court of the Table and Top of the Table Program

This event is exclusively for those members who have attained Court of the Table and Top of the Table qualifications. The program includes a presentation by a noted speaker on a topic relevant to those attaining MDRT's highest levels of membership. The presentation will be followed immediately by a reception where members will have an opportunity to meet the speaker.

This event is open only to 2012 Court of the Table and Top of the Table members and a ticket is required for admission. There is no charge for the program; however, preregistration is required. You must check the appropriate box under "Ticketed Events" on the Registration and Housing form to obtain a ticket.

4:30-6 p.m.

First Time Orientation

MDRT welcomes all first-time Annual Meeting attendees at a special two-part program. Short, language-specific sessions offer practical tips to help you enjoy your first MDRT Annual Meeting. Following a welcome from the 2012 MDRT President, **Jennifer A. Borislow, CLU**, learn how connections made at Annual Meetings can provide value in your practice. A motivational speaker with a message just for first-time attendees concludes the program.

PREPAID TICKETED EVENTS

Prepaid ticketed events must be purchased at time of registration. No tickets will be sold on-site. Check appropriate box under "Ticketed Events" on the Registration and Housing form. Paid ticketed events are non-refundable after May 4, 2012. Simultaneous interpretation will not be available for the prepaid ticketed events.

Monday, June 11

Lunch session — 12-1:30 p.m.

Top of the Table members share strategies that have helped them achieve high levels of professional success. Additional cost: USD 45

Tuesday, June 12

Breakfast session — 6-7:15 a.m.

One of the premier speakers in the financial services industry provides insight into client behavior and tips for advisors at all stages in their career. Additional cost: USD 35

Lunch session — 12-1:30 p.m.

This will be a repeat of Tuesday's breakfast session. See above description for more information. Additional cost: USD 45

Wednesday, June 13

Breakfast Session — 7-8:30 a.m.

Because of technology, people can find out a lot about you before meeting you. This session focuses on how to create a personal brand that sets you apart and how to convey a consistent message across different media. Additional cost: USD 35

Visit www.mdr.org/2012AM for a complete list of speakers and session descriptions.

DON'T MISS...

ConneXion Zone

Interact with other members, exhibitors and sponsors in the ConneXion Zone — the latest enhancement to the Annual Meeting. Here you can explore products, technology, ideas and services in small groups or on a one-on-one basis in a free-flow environment. Stop by Sunday, Monday, and Tuesday afternoon for Focus Session previews. Drop by the Technology Zone to brush up on your Twitter etiquette or watch engaging exhibitor product demos in the Big Ideas Theater and Presentation Pods. Every day you'll have the opportunity to discover something new in the ConneXion Zone. The hardest part will be choosing what to do next!

MDRT Foundation: Financial Professionals Changing Lives Worldwide

The MDRT Foundation is the philanthropic arm of the Round Table. During the MDRT Annual Meeting you can become an agent of change for children and families through the MDRT Foundation's charitable programs.

Wednesday, June 13, 8:30-10:30 p.m.

Party on the Platform Closing Celebration

For a perfect ending to your Annual Meeting experience, return to the Main Platform to sing and dance the night away with music provided by a live band. Once confirmed, the band will be announced on the 2012 Annual Meeting website.

A ticket is required for admission to this event. There is no charge; however, preregistration is required. You must check the appropriate box under "Ticketed Events" on the Registration and Housing form to obtain a ticket.

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WELCOME RECEPTION

Sunday, June 10 – 7:30–9:30 p.m.

The Anaheim Convention Center Arena Plaza will be transformed for you to enjoy the glitz and glamour of Southern California. After making your own entrance on the red carpet, prepare to be star-struck when the “rich and famous” arrive; also look for an appearance by Oscar himself! The legendary MDRT bands will provide the rhythms of the night as you mingle with “celebrities,” MDRT friends and colleagues. Beverages and snacks will be available during this fun, alfresco affair.



SCHEDULE AT A GLANCE*

SATURDAY, JUNE 9

11 a.m. – 5 p.m.	MDRT Power Center Store
11 a.m. – 6 p.m.	Registration
1 p.m. – 4 p.m.	Pre-Meeting Workshop – Successful Sales Strategies
1 p.m. – 4 p.m.	Pre-Meeting Workshop – Business Management
4:30 p.m. – 5:30 p.m.	Program General Arrangements (PGA) Volunteer Orientation

SUNDAY, JUNE 10

8 a.m. – 7 p.m.	Registration
10 a.m. – 5 p.m.	ConneXion Zone
10 a.m. – 5 p.m.	MDRT Power Center Store
11 a.m. – 1:30 p.m.	Court of the Table and Top of the Table Program and Reception
4:30 p.m. – 6 p.m.	First Time Orientation Program
7:30 p.m. – 9:30 p.m.	Welcome Reception

MONDAY, JUNE 11

7 a.m. – 4 p.m.	Registration
8 a.m. – 11:30 a.m.	Main Platform
10 a.m. – 5 p.m.	ConneXion Zone
11:30 a.m. – 5:30 p.m.	MDRT Power Center Store
12 p.m. – 1:30 p.m.	Lunch Session (<i>Prepaid ticketed event</i>)
2 p.m. – 5 p.m.	Focus Sessions
3:30 p.m. – 4:30 p.m.	Idea Exchange

TUESDAY, JUNE 12

6 a.m. – 7:15 a.m.	Breakfast Session (<i>Prepaid ticketed event</i>)
8 a.m. – 11:30 a.m.	Main Platform
11:30 a.m. – 5:30 p.m.	MDRT Power Center Store
11:30 a.m. – 5:30 p.m.	ConneXion Zone
12 p.m. – 1:30 p.m.	Lunch Session (<i>Prepaid ticketed event</i>)
2 p.m. – 5 p.m.	Focus Sessions
3:30 p.m. – 4:30 p.m.	Idea Exchange

WEDNESDAY, JUNE 13

7 a.m. – 8:30 a.m.	Breakfast Session (<i>Prepaid ticketed event</i>)
9 a.m. – 11:30 a.m.	Focus Sessions
9:30 a.m. – 1:30 p.m.	MDRT Power Center Store
10:30 a.m. – 11:30 a.m.	Idea Exchange
1:30 p.m. – 5 p.m.	Main Platform
3:30 p.m. – 5:30 p.m.	MDRT Power Center Store
8:30 p.m. – 10:30 p.m.	Party on the Platform Closing Celebration

* Schedule is subject change. For the most up-to-date information visit, www.mdrt.org/2012AM.

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**REGISTER ONLINE AT
MDRT.ORG/2012AM**

OR

Mail

MDRT Registration
Experient/MDRT
P.O. Box 4088
Frederick, MD 21705 USA

Fax

+1 301.694.5124



GENERAL INFORMATION

ANNUAL MEETING VENUE

The primary venue for the 2012 MDRT Annual Meeting is the Anaheim Convention Center, located at 800 West Katella Avenue, Anaheim, California, 92802 USA.

REGISTRATION

MDRT's official registration and housing service provider, Experient, will handle all registration and housing requests and changes.

REGISTRATION FEE SCHEDULE

Early Registration - February 1 to April 22

Early Registration Fee: USD 695

Registration forms with valid payment received on or before Sunday, April 22, 2012

Advanced Registration - April 23 to June 8

Registration Fee: USD 895

Registration forms with valid payment received Monday, April 23, through Friday, June 8, 2012

On-Site Registration Fee

Registration Fee: USD 995

Registration forms with valid payment received on or after Saturday, June 9, 2012 (processed on-site)

To arrange for Annual Meeting registration payment by wire transfer, please contact meetings@mdrt.org for bank details.

TRAVEL VISAS

For members who require assistance obtaining a visa to enter the United States, a personalized Annual Meeting invitation letter is available to download from the 2012 Annual Meeting website (www.mdr.org/2012AM) using an approved 2012 MDRT member ID number and birth date.

Members who are denied a United States visa are eligible to receive a full refund of the meeting registration fee only if official documentation of their visa denial is provided to MDRT (meetings@mdrt.org) by June 22, 2012. MDRT cannot process refunds for visa denials after June 22, 2012.

HOUSING

Anaheim Marriott - Co-Headquarters Hotel - Adjacent to Anaheim Convention Center

Standard room: USD 189 (Single/double occupancy)

Room rate includes:

Complimentary Internet, local and toll-free calls

10% discount in restaurants and food and beverage outlets with official meeting badge

All attendees who book their hotel reservation with MDRT's housing provider, Experient, will be entered into a drawing to win one complimentary hotel stay. (Complimentary stay will be for run-of-the-house room type booked during the official conference arrival and departure dates only.) Complimentary stay is provided by the Anaheim Marriott. Housing booking deadline for entry qualification is May 15, 2012.

The Hilton Anaheim Hotel - Co-Headquarters Hotel - Adjacent to the Anaheim Convention Center

Standard room: USD 189 (Single/double occupancy)

Room rate includes:

Complimentary toll-free calls

10% discount in restaurants and food and beverage outlets with official meeting badge

All attendees who book their hotel reservation with MDRT's housing provider, Experient, will be entered into a drawing to win one complimentary hotel stay. (Complimentary stay will be for run-of-the-house room type booked during the official conference arrival and departure dates only.) Complimentary stay is provided by the Hilton Anaheim. Housing booking deadline for entry qualification is May 15, 2012.

* All standard room rates are single/double occupancy, quoted in US dollars (USD) and do not include current taxes.

Please note the Anaheim Marriott and Hilton Anaheim are both non-smoking properties.

If you require special needs for housing accommodations or meeting assistance, please note this on the Registration and Housing form or notify MDRT at meetings@mdrt.org. Experient and MDRT will do their best to accommodate your special request.

Please contact Experient directly for upgrade and/or suite availability.

See www.mdr.org/2012AM for area map.

HOUSING INFORMATION

Experient will handle all housing requests on a first-come, first-served basis. Hotel choice and room rate preferences are requests only and not guaranteed. Please include arrival and departure dates on the housing form. If this information is not complete, Experient will automatically reserve your hotel for arrival Sunday, June 10 and departure Wednesday, June 13. A credit card valid through August 2012 is required to confirm your reservation. American Express, Visa, MasterCard and Discover credit cards are accepted. Confirmation of your registration and hotel will be sent from Experient by email, fax or mail within 72 hours of receipt of your completed Registration and Housing form. Deadline for receipt of housing requests is May 4, 2012. Housing requests received after this date will be processed based on availability. Housing is limited. After May 26, contact the hotel directly to make or change reservations. Be sure to list full names of any roommate(s). Keep a copy of your Registration and Housing Confirmation for your records.

HOUSING CHANGES AND CANCELLATIONS

Reservation changes or cancellations must be made in writing to Experient on or before May 4, 2012, and will be based on availability. After this date, all reservations will be transmitted to the hotels. Please wait until May 26 to contact the hotel directly for additional reservations, changes or cancellation requests. Cancellations within the individual hotel's policy or failure to check in on your confirmed arrival date will be assessed a one night's room and tax penalty and loss of reservation. Canceled hotel rooms cannot be reinstated and will be treated as a new request.

REGISTRATION AND HOUSING INQUIRIES

Please contact Experient at:

Phone +1 847.996.5876
(outside the U.S. and Canada)
+1 800.974.3084 (U.S. and Canada only)

Email mdrt@experient-inc.com

Fax +1 301.694.5124

Mail MDRT Registration
Experient/MDRT
P.O. Box 4088
Frederick, MD 21705 USA



SIMULTANEOUS INTERPRETATION AND HEADSETS FOR THE HEARING IMPAIRED

English is the official language of the 2012 MDRT Annual Meeting. MDRT will provide simultaneous interpretation of the Main Platform presentations and selected Focus Sessions only in the following 12 languages when at least 50 registered members have requested interpretation in a common language: Bahasa Indonesian, Cantonese, Greek, Hindi, Japanese, Korean, Mandarin, Polish, Portuguese, Spanish, Thai, Vietnamese.

Requests for simultaneous interpretation must be made in advance at the time of registration. All requests for interpretation must be received on or before May 4, 2012.

MDRT will provide interpretation headsets and receivers to all registered members who meet the above requirements. The availability of headsets and receivers is not guaranteed to members who did not request simultaneous interpretation when registering in advance or to those who register for the meeting on site.

Should you require use of a headset for the hearing impaired, please check the "special needs" box on the Registration and Housing form.

Note: A security deposit of USD 400 will be required for all headset rentals via personal credit card (American Express, Visa, MasterCard). When the equipment is returned undamaged at the end of the meeting, the credit card voucher will be returned and no charge will have been made.

DOWNLOAD YOUR OWN AUDIO LIBRARY NEW

All 2012 MDRT members who register and attend the Annual Meeting will have free access to an online audio recording library of the 2012 meeting's Focus and Special Sessions, including the ability to download MP3 audio files.

ANNUAL MEETING REGISTRATION REFUND POLICY AND SCHEDULE

Registration cancellation requests must be faxed or emailed to Experient to be eligible for a refund. All refunds will be issued in the original form of payment.

Cancellation received:	Refund:
February 1 - May 9, 2012	100% (less USD 50 administrative fee)
May 10-25, 2012	50% (less USD 50 administrative fee)
May 26, 2012 and thereafter	No refund
Ticketed prepaid events	No refunds after May 4, 2012

PGA - JOIN THE TEAM OF VOLUNTEERS

Program General Arrangements (PGA) wants your help to make the 2012 Annual Meeting an enjoyable experience for the more than 5,000 members expected to attend the meeting. PGA volunteers greet attendees, direct foot traffic, answer attendees' questions, and welcome attendees to the meeting.

Every year, more than 500 MDRT members from around the world volunteer during the MDRT Annual Meeting. These volunteers get more out of their meeting experience than just helping the meeting run smoothly. Volunteers find that being a part of the team enhances their meeting experience and is a great way to meet new MDRT friends. Volunteering for PGA lets you network with your fellow members, give back to the organization and teaches you new skills to prepare you for future leadership positions. The PGA is guided by dedicated MDRT members.

PGA volunteers have the option of joining up to two task forces. Please plan to attend the PGA orientation session on Saturday, June 9 from 4:30-5:30 p.m. Please note this is before the Annual Meeting begins. You will meet with your specific task force leaders and be given details regarding your meeting assignment during this orientation session.

AIRPORT INFORMATION

There are two nearby airports to choose from when flying to Anaheim.

John Wayne Airport (SNA) <http://www.ocair.com>, is approximately 15 miles or 20 minutes from Anaheim's Convention Center.

Bus service - fee USD 10.00 (one way)

Taxi service - approximate fee USD 35.00 (one way)

Los Angeles International (LAX)

<http://www.lawa.org>, is approximately 35 miles or 60 minutes from Anaheim's Convention Center.

Bus service - fee USD 16.00 (one way)

Taxi service - approximate fee USD 85.00 (one way)

CORPTRAV

CorpTrav, MDRT's official travel provider, can assist with airline needs.

Phone +1 630.656.6674 or +1 800.323.3800

Email mdrt@corptravel.com

Website www.corptrav.com

Hours 24/7/365

HERTZ

Hertz has provided MDRT members with special daily, weekend or weekly rates so you can take in the sites of Southern California.

You can redeem these special meeting rates by booking online or by calling Hertz directly.

Website www.Hertz.com

Code 02RA0023

Phone +1 405.749.4434 or +1 800.654.2240 (U.S. and Canada only)



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BE SOCIAL WITH MDRT

To keep current on all MDRT Annual Meeting happenings before the meeting, make sure you are a fan of Million Dollar Round Table on Facebook. You will receive the latest meeting updates and information.

MDRT will be tweeting live at the 2012 Annual Meeting, and we want you to join us. To join the MDRT Twitter community, follow us at @MDRTweet and use #MDRT2012 to search for and start conversations.

#MDRT2012

