

2013 年 MDRT 目標 基於 2012 年業務量

下面表格中以新台幣為單位列出 2013 年百萬圓桌會員、超級會員(Court of the Table)、頂尖會員(Top of the Table)每月需要達成的業績目標。在 2012 業務年

月份	MDRT 備金	超級會員 備金	頂尖會員 備金	我的 備金	MDRT 保費	超級會員 保費	頂尖會員 保費	我的 保費	MDRT 收入	超級會員 收入	頂尖會員 收入	我的 收入
1月	157,342	472,025	944,050		314,683	944,050	1,888,100		269,225	807,675	1,615,350	
2月	314,683	944,050	1,888,100		629,367	1,888,100	3,776,200		538,450	1,615,350	3,230,700	
3月	472,025	1,416,075	2,832,150		944,050	2,832,150	5,664,300		807,675	2,423,025	4,846,050	
4月	629,367	1,888,100	3,776,200		1,258,733	3,776,200	7,552,400		1,076,900	3,230,700	6,461,400	
5月	786,708	2,360,125	4,720,250		1,573,417	4,720,250	9,440,500		1,346,125	4,038,375	8,076,750	
6月	944,050	2,832,150	5,664,300		1,888,100	5,664,300	11,328,600		1,615,350	4,846,050	9,692,100	
7月	1,101,392	3,304,175	6,608,350		2,202,783	6,608,350	13,216,700		1,884,575	5,653,725	11,307,450	
8月	1,258,733	3,776,200	7,552,400		2,517,467	7,552,400	15,104,800		2,153,800	6,461,400	12,922,800	
9月	1,416,075	4,248,225	8,496,450		2,832,150	8,496,450	16,992,900		2,423,025	7,269,075	14,538,150	
10月	1,573,417	4,720,250	9,440,500		3,146,833	9,440,500	18,881,000		2,692,250	8,076,750	16,153,500	
11月	1,730,758	5,192,275	10,348,550		3,461,517	10,384,550	20,769,100		2,961,475	8,884,425	17,768,850	
12月	1,888,100	5,664,300	11,328,600		3,776,200	11,328,600	22,657,200		3,230,700	9,692,100	19,384,200	



MDRT
The Premier Association of
Financial Professionals®

2013 Million Dollar Round Table

(Abridged version. For more detailed information on membership requirements, go to www.mdr.org.)

PRODUCTION CREDIT

UNLIMITED CREDIT/RISK-PROTECTION PRODUCTS

Products from life insurance companies

Accidental death and dismemberment (individual)
Critical illness (individual)
Disability income contracts (individual)
Life (individual)
Up to annual premium/target premium
Deposits in excess of annual/target premium
Single premium (whole life and investment)
Short-term endowment rider (max 15 yrs)
Long-term endowment rider
Long-term care (individual)

Commission/Fee Credit

100% of first year commission
100% of first year commission
100% of first year commission
100% of first year commission
100% of first year commission
100% of commission paid
100% of first year commission
100% of first year commission
100% of first year commission
100% of first year commission

Premium Credit

100% of first year premium
100% of first year premium
100% of first year premium
100% of first year premium
100% of first year premium
6% of excess premium
6% of first year premium
6% of first year premium
6% of first year premium
100% of first year premium

Accidental death and dismemberment (group)
Critical illness (group)
Disability income contracts (group)
Life (group)
Long-term care (group)

100% of first year commission
100% of first year commission
100% of first year commission
100% of first year commission
100% of first year commission

10% of first year premium
10% of first year premium
10% of first year premium
10% of first year premium
10% of first year premium

Annuities (individual and group)
Single premium and/or short-term endowment (max 15 yrs.)

100% of all commissions
100% of first year commission

6% of new money invested
6% of first year premium

LIMITED CREDIT

Products

Health care (individual)
Health care (group)
Mutual funds
Securities
Wrap accounts/asset management accounts
Financial Planning Fees/Fees for Advice

Commission/Fee Credit

100% of first year commission
100% of first year commission
100% of all commissions
100% of commission on new money invested
100% of all commissions
100% of the net fee

Premium Credit

100% of first year premium
10% of first year premium
6% of new money invested
6% of new money invested
6% of new money invested
100% of the gross fee

PRODUCTION REQUIREMENTS

1. Production Methods

Membership in the 2013 Round Table will be based on the following production methods:

• Commission/Fee Method

A minimum of TWD 1,888,100 of eligible commissions paid is required. Of this total, a minimum of TWD 944,050 of paid commissions (50 percent of the requirement) must come from products listed in the Unlimited Credit category.

• Premium Method

A minimum of TWD 3,776,200 of eligible paid premium is required. Of this total, a minimum of TWD 1,888,100 of premium (50 percent of the requirement) must come from products listed in the Unlimited Credit category.

• Income Qualification Method

A minimum of TWD 3,230,700 in annual gross income from the sale of insurance and financial products is required. A minimum of TWD 944,050 must be income from new business generated during the production year. Further, a minimum of TWD 944,050 must be derived from income associated with risk-protection products (products eligible for Unlimited Credit under the commission or premium methods). It is possible that the same business, for example the sale of new life insurance policies, could satisfy both requirements.

2. Court of the Table

• Commission & Premium Method

A minimum of TWD 5,664,300 of eligible commissions paid or TWD 11,328,600 of eligible paid premium is required. At least TWD 944,050 of commission or TWD 1,888,100 of premium (50 percent of the entry-level MDRT requirement) must come from products listed in the Unlimited Credit category before an applicant can use any credit from policies listed under the Limited Credit category.

• Income Method

A minimum of TWD 9,692,100 of eligible annual gross income is required. The applicant must meet the minimums of TWD 944,050 in new business and TWD 944,050 in risk-protection business.

3. Top of the Table

• Commission & Premium Method

A minimum of TWD 11,328,600 of eligible commissions paid or TWD 22,657,200 of eligible paid premium. At least TWD 944,050 of commission or TWD 1,888,100 of premium (50 percent of the entry-level MDRT requirement) must come from products listed in the Unlimited Credit category before an applicant can use any credit from policies listed under the Limited Credit category.

• Income Method

A minimum of TWD 19,384,200 of eligible annual gross income is required. The applicant must meet the minimums of TWD 944,050 in new business and TWD 944,050 in risk-protection business.

• Top of the Table Waivers

Top of the Table members with a minimum of 10 years of Top of the Table membership who do not meet the required minimum production level may apply under the Top of the Table waiver provision, but must submit required Top of the Table dues.

MDRT MEETINGS

*MDRT Annual Meeting

10-13 June 2012
Anaheim, California, USA

9-12 June 2013

Philadelphia, Pennsylvania, USA

*Top of the Table Annual Meeting

10-13 September 2012
Amelia Island, Florida, USA

**Attendance at the MDRT Annual Meeting and Top of the Table Annual Meeting is open to approved members of the 2012 Table and requires payment of separate registration fees.*

*MDRT Experience

21-23 February 2013
Hyderabad, India

**The MDRT Experience meeting is open to MDRT members and nonmembers.*