



## What is the mission of MDRT Academy?

The MDRT Academy was built with a singular focus: helping your advisors go further than they ever thought, faster than they ever imagined, while becoming finer at their craft. With the culture, member expertise and best practices of MDRT behind the offerings, producers can achieve sustainable levels of production and attain MDRT status.

**Master best practices from the best in the business.**



### MEMBERSHIP

#### Requirements

Advisors who aspire to qualify for MDRT

#### Join anytime

Apply for membership annually

#### Company involvement

Group membership

*"The Academy was huge for me because, for any young financial advisor, the biggest roadblock, I think, is lack of confidence. Having a one-stop shop to really hear from the top financial advisors in the industry was huge."*

**Brandon Heckert**

### Benefits to your business:

- › Complements company/product training efforts by introducing an Assessment and behavior-changing tools to build strong sales, client management and prospecting systems
- › Access to best-in-class content, discussions and productivity-enhancing resources from MDRT members
- › Improves new-advisor retention and accelerates producer growth, leading to sustainable performance
- › Provides an infusion of motivation to producers who have plateaued
- › One-on-one mentoring with experienced members via the MDRT Mentoring Program

### Exclusive content:

The MDRT Academy library is an ever-growing collection of personalized articles, videos and Webcasts to help members develop professional skills to go above and beyond in the financial services profession.

The MDRT Academy combines the value of an association membership with the convenience and accessibility of a mobile app. Members are guided to content via the MDRT Academy App based on the results of an Assessment of their strengths in 15 areas deemed by MDRT members to be critical to long-term success.

Members have access to Critical Mindsets, in-depth Performance Guides and other tools to help propel your performance.

### Benefits to your advisors (MDRT Academy members):

- › MDRT-quality resources and support
- › Personalized membership journey
- › Goal-setting and -tracking features
- › Rewards and recognition
- › Access to MDRT events
- › Enhanced credibility through connections to MDRT

*"We've seen in the industry, fewer organizations, fewer traditional insurance carriers or broker-dealers that are providing a really deep level of training, mentoring and development in the first three to five years of their business. So, for MDRT to create this Academy to help newer, younger members grow and be successful is fantastic because we can provide a resource in the industry that I think is lacking and really create that next generation of advisors in the global community."*

**Brendan Clune Walsh**

# The MDRT Family of Brands

Equips financial services professionals to **Rise. Excel. Lead.** Throughout every stage of their career journey.



## MORE ABOUT MDRT'S ADDITIONAL SERVICES:



**MDRT**

The Premier Association  
of Financial Professionals®

### What is the mission of MDRT?

A community of continued excellence dedicated to aiming higher and achieving more, MDRT is where financial services professionals surround themselves with the best in the business – and where they're inspired to continue learning, achieving and celebrating each level of success.

MDRT offers proven methods and best practices for growth from top-tier advisors around the world. By collaborating daily with advisors who uphold exceptional professional knowledge, client service and ethical standards, your advisors will refine their skill sets, bring more value back to your organization and inspire collective success.

**MDRT is the Premier Association  
of Financial Professionals®.**



Visit [mdrt.org](http://mdrt.org) to learn why MDRT is the association for professionals who aspire for more.



**MDRT CENTER  
for FIELD LEADERSHIP™**

Building Leaders to Build Success

### What is the mission of the MDRT Center for Field Leadership?

The MDRT Center for Field Leadership was founded by MDRT as a membership association specifically for field and home office leaders that fosters a culture of continuous improvement and learning.

As field and home office leaders join and engage with the MDRT Center, they will accelerate their growth, build an MDRT culture of excellence, increase productivity, connect with other leaders, and learn from content and tools developed specifically for them to take their teams to the next level.



Visit [mdrtcenter.org](http://mdrtcenter.org) to see how quickly the leadership journey can begin with the MDRT Center for Field Leadership.