

FREQUENTLY ASKED QUESTIONS | Agency Manager Program *(updated September 2025)*

WHO IS ELIGIBLE?

- The Agency Manager Program is **ONLY** available in:
 - **Japan and the Republic of Korea** through 2026 (ends in 2027) and is limited to two participants per company
 - **Mainland China and Brazil** (ongoing)

Eligible participants:

- First-line managers (heads of traditional or multiline agencies/firms) and frontline or second/middle-line managers (sales/unit managers), defined as:
 - Individuals responsible for the strategic leadership and operational management of a financial services firm or agency (e.g., general agents, OSJs and managing partners)
 - Individuals responsible for recruiting, selecting, training, supervising or coaching financial services advisors or agents (e.g., managing directors, sales managers and agency/firm owners)
- Applicants must personally supervise full-time career agents, advisors or sales representatives.

WHO IS NOT ELIGIBLE?

- In 2026, individuals outside of Japan, the Republic of Korea, Mainland China and Brazil are not eligible. The program in Japan and the Republic of Korea will conclude in 2027.
- Individuals responsible for providing key leadership or support to the corporation's field leaders, sales force or curriculum development (e.g., chief learning officers, chief marketing officers and chief distribution officers) are not eligible.
- Individuals from English-speaking markets are not eligible. Those individuals may join the MDRT Center for Field Leadership, which grants eligibility to attend the 2026 MDRT Annual Meeting or 2026 MDRT Global Conference. To join, visit mdrtcenter.org/join.

HOW DO I ENROLL IN THE AGENCY MANAGER PROGRAM?

- Individuals in Japan, the Republic of Korea, Mainland China and Brazil must have five MDRT members registered for the 2026 MDRT Annual Meeting or 2026 MDRT Global Conference. Enrollment forms with fewer than five will be held in pending status until all five attendees are registered.
- Create a user profile at my.mdr.org. Once completed, email your MDRT ID to agencymngmtprogram@mdrt.org. You will receive a

confirmation email from MDRT once your profile is activated, after which you can enter your five attendees.

DOES THE MANAGER HAVE TO PAY TO ATTEND THE MEETING?

- Yes, managers follow the same fee schedule as MDRT members.
- For registration questions, contact the MDRT Meeting Services department at meetings@mdrt.org.

WHAT HAPPENS IF I CAN'T MEET THE REQUIRED FIVE REGISTRANTS?

- Five registered members are required. There are no exceptions.

CAN I SHARE AN MDRT MEMBER ID WITH ANOTHER MANAGER?

- No, each manager must provide five unique MDRT ID numbers for their registered MDRT members.

ARE THERE RESTRICTIONS TO WHAT SESSIONS I CAN ATTEND AT THE MEETING?

- Managers may attend all sessions except closed meetings or private events.

WHEN AND HOW DO I REGISTER FOR THE MEETING?

- Once enrolled and all requirements are met, managers will receive a registration link via email.

IS THERE A DEADLINE TO ENROLL IN THE AGENCY MANAGER PROGRAM?

- There is no formal deadline, as enrollment is on a first-come, first-served basis. If the meeting reaches capacity, the Agency Manager Program will also be closed.

IF MY QUESTIONS ARE NOT LISTED HERE, WHOM DO I CONTACT?

- Send Agency Manager Program questions to agencymngmtprogram@mdrt.org.
- Send eligibility questions to specialguests@mdrt.org.
- Send 2026 MDRT Annual Meeting or 2026 MDRT Global Conference questions to meetings@mdrt.org.