



MDRT®

Brand Guidelines



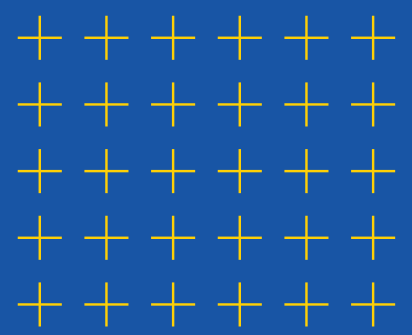
Welcome

The following document is a guide that enables you to understand MDRT brand principles and define its visual stylistic elements and approved usage. The MDRT corporate logo is more than just a logo; it is the symbolic representation of the collaborative nature of its membership. The Round Table represents members worldwide who have achieved similar goals coming together.



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Colors & Typography



Color Palette

The color palette has two groups: primary and secondary. The primary colors should be dominant within a design or graphic, while the secondary colors should complement them through additional textures and design details. The color values for the CMYK, RGB, Hexadecimal and PMS color-matching systems are provided below.

PRIMARY COLOR PALETTE

CMYK	95 / 75 / 0 / 0	44 / 0 / 6 / 0	0 / 17 / 100 / 0	85 / 45 / 2 / 0
RGB	24 / 83 / 163	122 / 223 / 244	255 / 207 / 0	1 / 124 / 189
HEXADECIMAL	#1853A3	#7ADFF4	#FFCF00	#017CBD
PMS	293C	2985C	2925C	109C

SECONDARY COLOR PALETTE

CMYK	100 / 90 / 35 / 30	0 / 63 / 72 / 0	2 / 1 / 1 / 0	20 / 10 / 10 / 75
RGB	15 / 43 / 90	244 / 126 / 83	248 / 248 / 248	77 / 83 / 87
HEXADECIMAL	#0F2B5A	#F47E53	#F8F8F8	#4D5357
PMS	289C	7413C	7541C	431C

Fonts

The MDRT brand consists of three primary fonts: Avenir Next, Merriweather and Nunito Sans. All branded materials should use these fonts as much as possible to maintain a consistent look and feel. These fonts are visually engaging and highly readable in various weights and sizes.

Aa

AVENIR NEXT

This sans serif font is great for body copy, as it has a large x-height and is very legible at smaller sizes. The variety of weights allows designs to have depth and highlight important information. Due to its geometric structure, this font can also be used well as subheads, in all caps, and as an oversized dynamic graphic.

Characters

abcdefghijklmnop
nopqrstuvwxyz
ABCDEFGHIJKLM
NOPQRSTUVWXYZ
1234567890
!@#\$%^&*()

Available Weights

Light
Book
Roman
Medium
Heavy
Black

License

Avenir Next must be purchased from a font foundry and used under that licensing agreement. A license can be purchased at **myfonts.com** as well as other sites.

Aa

MERRIWEATHER

While Bodoni is used in the MDRT logo, the only serif font that should appear in the rest of the branded materials is Merriweather. This typeface is great for headlines, as it has an excellent visual relationship to the logo.

Characters

abcdefghijklmnop
nopqrstuvwxyz
ABCDEFGHIJKLM
NOPQRSTUVWXYZ
1234567890
!@#\$%^&*()

Available Weights

Light
Regular
Bold
Black
Ultra Bold

License

Google designed Merriweather, which is available under an open-source license. You can use it with your Adobe Fonts account just like any other font in the Adobe Fonts library. Under these licenses, the font can be used online or in print.

fonts.adobe.com/fonts/merriweather
fonts.google.com/specimen/Merriweather

Aa

NUNITO SANS

This font can be used as an alternate sans serif **when Avenir Next is unavailable**. Its applications will be similar to Avenir Next's; however, Nunito Sans should not be used for headlines or large graphics, as it is less elegant at large sizes.

Characters

abcdefghijklmnop
nopqrstuvwxyz
ABCDEFGHIJKLM
NOPQRSTUVWXYZ
1234567890
!@#\$%^&*()

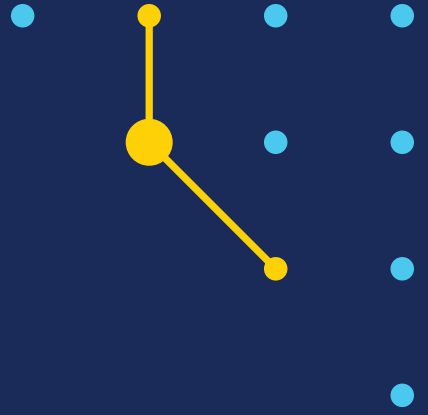
Available Weights

Extra Light
Light
Regular
SemiBold
Bold
ExtraBold
Black

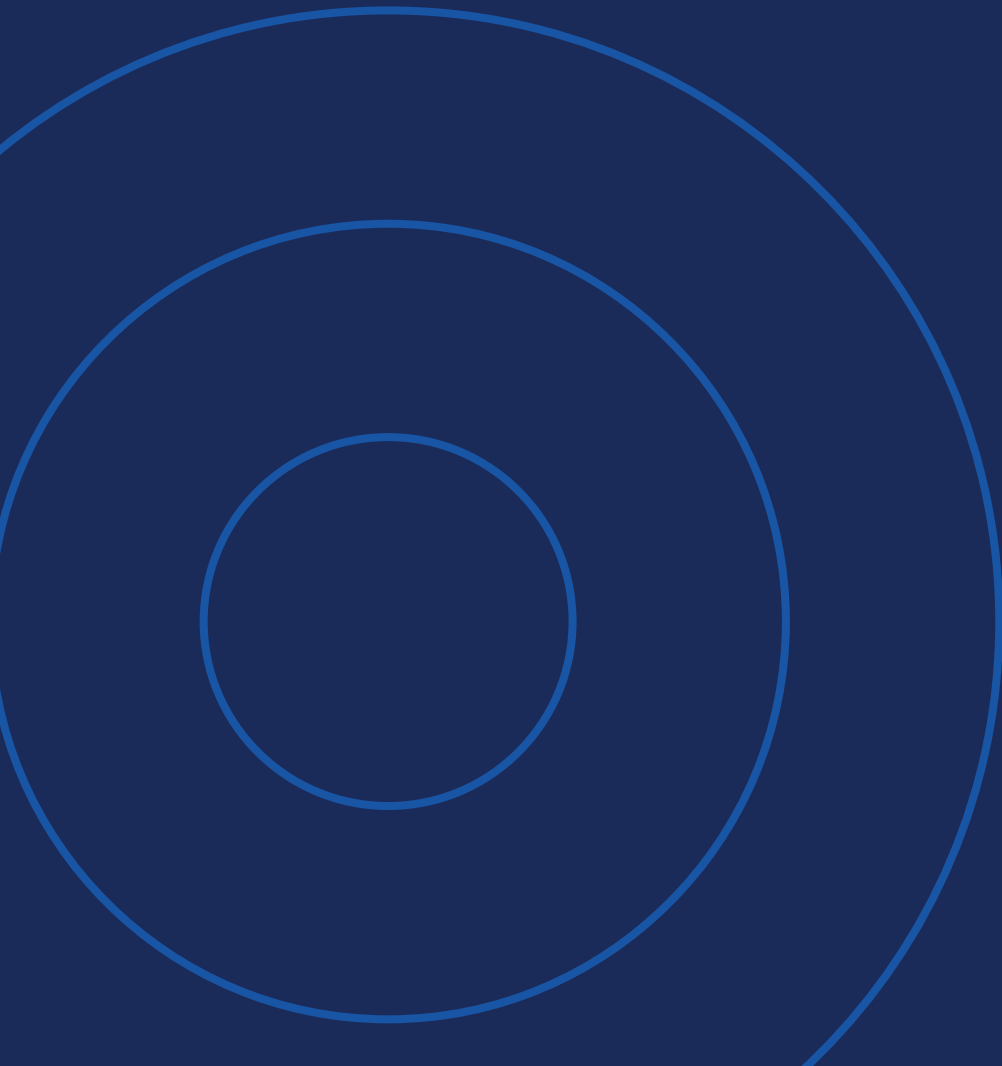
License

Nunito Sans is available via an open-source license. You're free to use it with your Adobe Fonts account just as you would any other font in the Adobe Fonts library. Under these licenses, the font can be used online or in print.

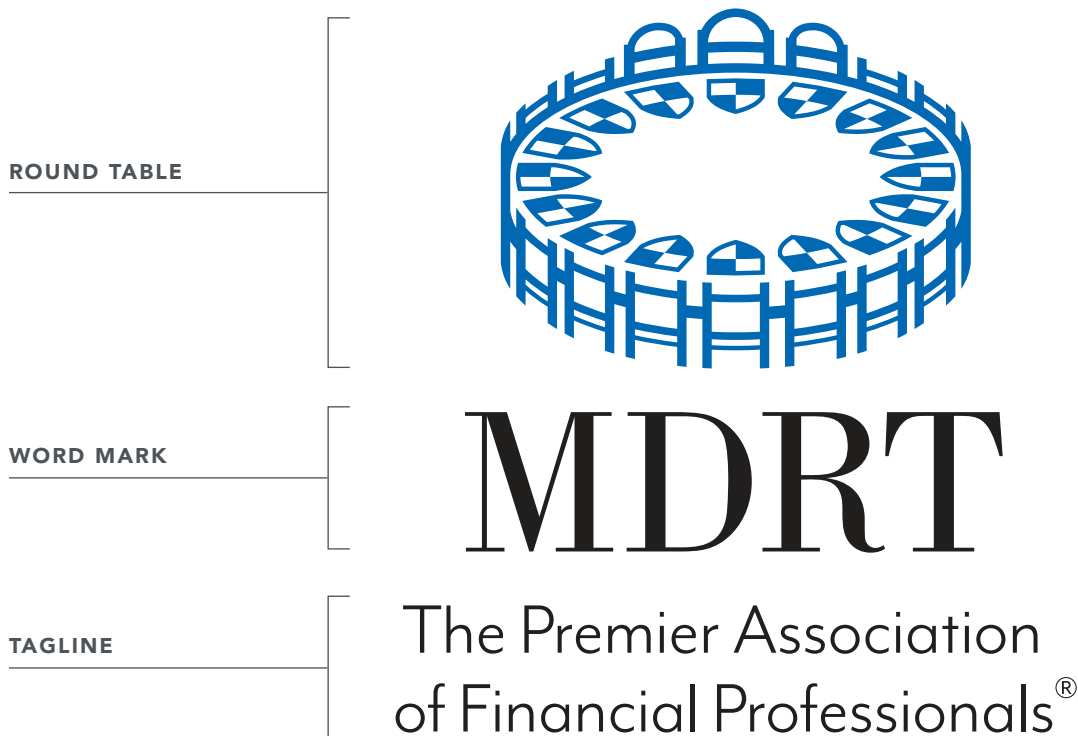
fonts.adobe.com/fonts/nunito-sans
fonts.google.com/specimen/Nunito+Sans



Logo



Logo Overview



GENERAL RULES

The MDRT corporate logo should always be used as a whole, as shown above. The logo should not be cropped or used in pieces other than approved logo variations (see Page 8).

The MDRT logo can be used in one color or duo-tone, as noted in the color variations (see Page 9).

The tagline should always accompany the logo unless the provided print area does not allow for it or the logo is being used in communications to an audience familiar with the MDRT brand. In these cases, the logo can be used without the tagline.

The logo should not be placed over a competing background.

MDRT member-designed apparel should not incorporate the MDRT corporate logo. Items featuring the corporate logo are only available from the MDRT Store and signify that they have been officially received from the organization. MDRT member-designed apparel must incorporate the MDRT member logo (see Page 11).






Outdated or incorrectly altered versions of the MDRT corporate logo will not be used or approved for usage.

The MDRT Round Table should not be used as a stand-alone MDRT corporate logo. It can be used as a decorative design element but must be accompanied by an approved MDRT corporate logo (see Page 10).

Logo Orientation

The MDRT logo is available in various orientations. The chart below serves as a guide for understanding the naming convention of each file.

The registered mark (®) must always appear with the MDRT logo. All logos distributed by MDRT already contain the registered mark in the appropriate places. These are not to be changed or removed.

	MDRT+RT	MDRT+RT+PA
HORIZONTAL		
STACKED		
FULL HORIZONTAL	N/A	

Logo Color Variations

The MDRT logo is available in various orientations and color combinations. The logo can only be used in one of the provided formats and color combinations. Logos created in metallic gold and silver are acceptable but only when done in one finish.



MDRT

The Premier Association
of Financial Professionals®

WHITE



MDRT

The Premier Association
of Financial Professionals®

2-COLOR



MDRT

The Premier Association
of Financial Professionals®

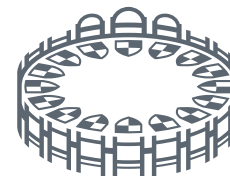
GRAY SCALE



MDRT

The Premier Association
of Financial Professionals®

PMS 293

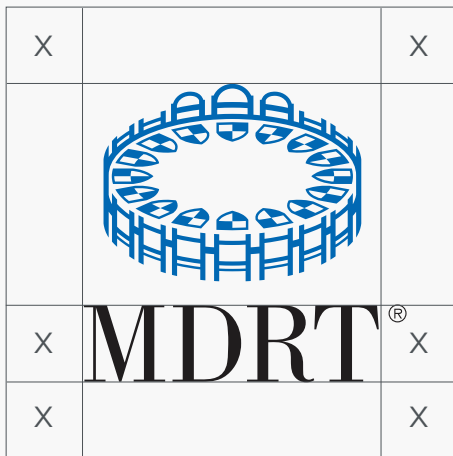


MDRT

The Premier Association
of Financial Professionals®

PMS 431

Logo Usage



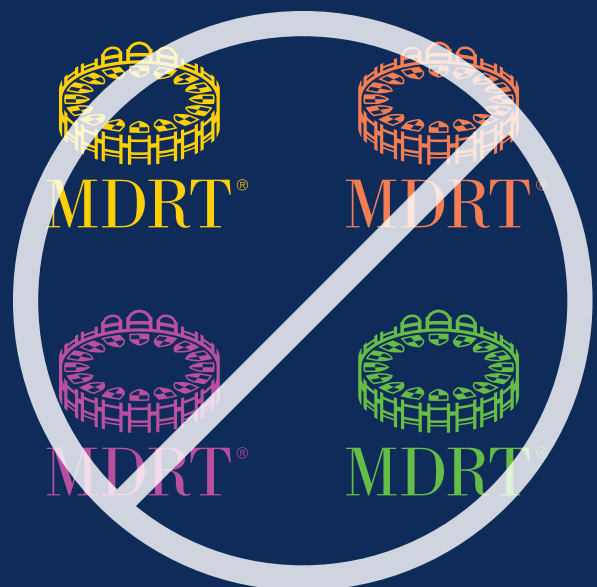
Always allow the appropriate amount of clear space around the logo near text or other design objects. Use the height of the “M” to set the clear space around the logo.



The Round Table and shield may be used as a watermark, but only as a graphic element, not to replace the main logo. Use of these elements is at the discretion of MDRT Headquarters Marketing Department.



When placing a logo on a photo, select the color option to provide the best contrast.



DO NOT use the logo in any colors other than the provided options.

MDRT Member Logos

The MDRT member logos in all variations are to be used exclusively by those who have been approved for MDRT membership each year. The logos are only to be used during the year the member has been approved for membership. It is not to be used by someone who attained the production levels needed for MDRT but has not joined; they must submit an application, pay membership dues and be approved by the organization.

MDRT also asks that apparel include the year the member became approved. MDRT members earn membership annually; it is an important goal. To respect the members who qualify and join each year, we ask that all apparel produced outside MDRT include the approval year.

Similar to the primary MDRT logo, all Member logos can be used in the same color combinations and with or without the tagline.

Member



MDRT®

Life Member



MDRT®

Court of the Table
Member



MDRT®

Qualifying &
Life Member



MDRT®

Qualifying
Member



MDRT®

Top of the Table
Member



MDRT®

MDRT Meeting Identifiers

MDRT has specific branding for each of its meetings that MDRT refers to as meeting identifiers including, MDRT Annual Meeting, MDRT Global Conference, Top of the Table Annual Meeting, and MDRT EDGE. These are to be used in conjunction with the MDRT logo when reproduced. Please reference meeting style guides for meeting specific branding guidelines.



MDRT
ANNUAL
MEETING
2024
VANCOUVER



MDRT
GLOBAL
CONFERENCE

AUGUST 28-30, 2024
DUBAI



TOP
— OF THE —
TABLE

ANNUAL MEETING

September 25–28, 2024

Fairmont Orchid, Hawaii, USA



MDRT **EDGE**
ATLANTA SM

Corporate Co-branding

The MDRT logo may be used in conjunction with other company logos, especially within internal office communications. A good example of this is when a company is promoting MDRT membership. It is acceptable for company logos to appear side by side with the MDRT corporate logo to signify support.



COMPANY LOGO

SAMPLE APPLICATIONS

A company could use the MDRT corporate logo when displaying collaboration with the organization.

Sample applications and uses with permission and approval of MDRT that you may have for the MDRT corporate logo are:

- Collateral to promote and support MDRT membership
- Collateral to promote MDRT events
- Communicating the importance of MDRT to producers
- In conjunction with the name of MDRT Days or chapter titles
- Official emails or newsletters sent to chapter members through MDRT-affiliated communication (to be approved by MDRT)

The MDRT corporate logo is not to be worn by members (or nonmembers) or displayed at individuals' workstations. This use is reserved for MDRT member logos.

Examples of co-branded items requiring the MDRT member logo would be trophies or awards apparel, such as hats, shirts, jackets and briefcases. The MDRT Store offers official MDRT products for members. The first place to go when looking for items featuring the MDRT corporate or member logos is the MDRT Store.



Photography, Textures & Patterns





Stock Photography

Photos from stock photography websites are used to help visually connect with audience members. The imagery should feel authentic and realistic while displaying diverse people in various office environments.





Custom Photography

Images from meetings, events or portraits are used to show actual members of the organization. The photos focus on networking, educational opportunities and camaraderie that members experience. The tone of the images should be bright and convey joy.



Photo Corners

Photos often feature rounded or beveled corners. This design feature often complements the brand's textures and patterns. The corner effect is limited to one corner per photo but can be used on any of the four corners.



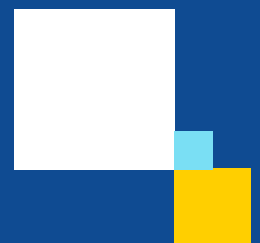
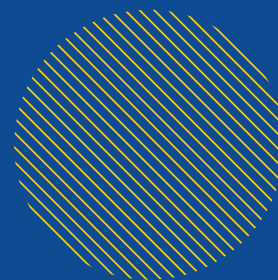
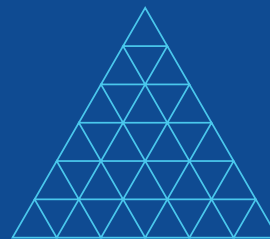
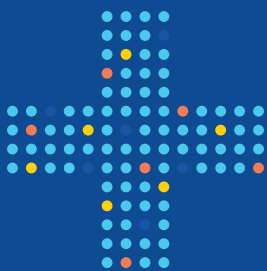
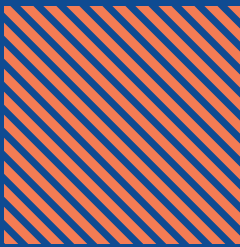
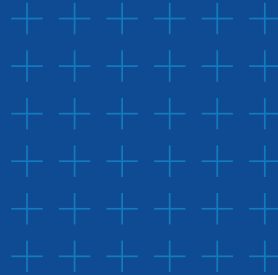
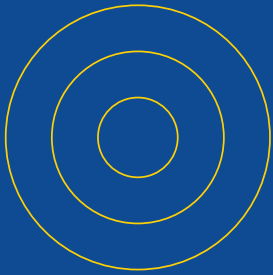
← Top right +
Rounded corner



→ Bottom left +
Beveled corner

Textures & Patterns

A pivotal component of the MDRT visual brand is the use of geometric patterns and shapes to make each layout more dynamic. There is no limit to what patterns or shapes can be used; however, a series of graphics has been created as a starting point to build design layouts. These graphics can be used in any color combination within MDRT brand colors.



Iconography

Corporate Icons



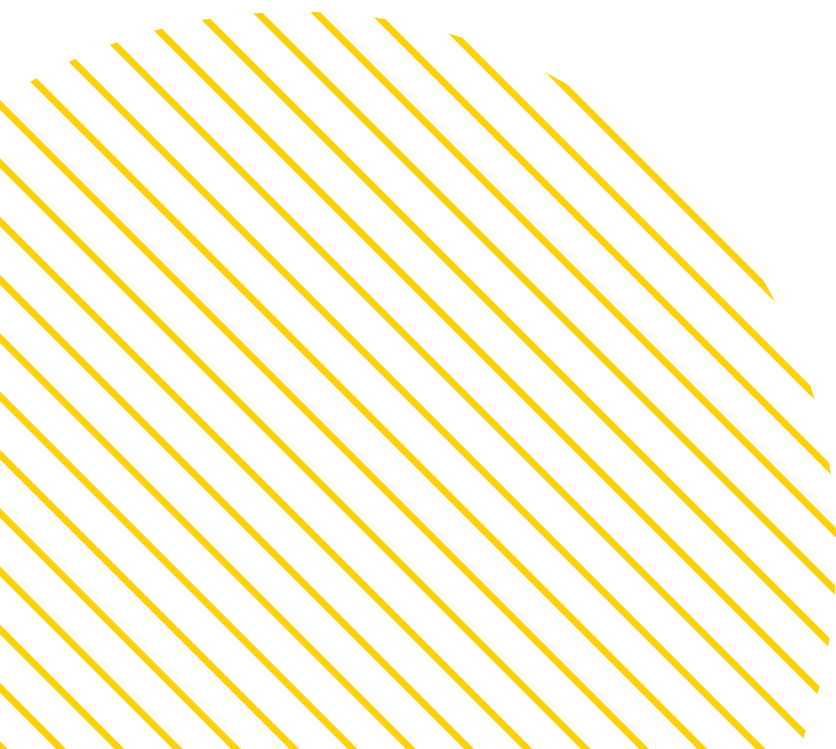
Volunteer Training Icons



Family of Brands Arrows



Design Samples



Printed Collateral



The Benefits of Membership

Founded in 1927, the Million Dollar Round Table (MDRT) is The Premier Association of Financial Professionals®.

Exclusive MDRT membership is limited to the top financial services and life insurance professionals who adhere to strict professional and ethical standards to build trust and confidence with their clients.

In an intensely competitive profession, objections are routine and regulatory changes are the norm. MDRT is where advisors come to learn how to achieve greater success and more sustainable careers.

MDRT connects its members to an unmatched global network, providing a unique mix of resources and networking to inspire growth in their business. With face-to-face interactions and access to the ideas members are using every day, even the best financial professionals discover innovative ideas to boost their productivity, build their businesses and discover new success strategies.

Empower Your Growth

ADVANCE YOUR CAREER

MDRT's ever-increasing membership production requirements, and the higher Court of the Table and Top of the Table® membership levels, reinforce the importance of setting and achieving target goals.

RISE AS A LEADER

MDRT creates opportunities for its members to serve as volunteer leaders within the organization, helping to develop more skills to strengthen their business.

GIVE BACK

The MDRT Foundation offers members opportunities to support charitable causes and organizations, become community leaders and build relationships with financial leaders in the financial services profession.

BUILD CLIENT TRUST

MDRT members are held to a high code of ethics, strengthening confidence among clients.

Meetings

Learn from and be inspired by the best financial services professionals from around the world at the MDRT EDGE and Top of the Table Annual Meeting, MDRT and attend more meetings, they are an increase in production over time.

CONNECTED

MDRT Member-Benefits membership

MDRT Headquarters
+1 800 292-2378
info@mdrt.org



Mentoring Program

What is the MDRT Mentoring Program?

The MDRT Mentoring Program provides counseling, guidance and encouragement from a committed MDRT member to an aspiring MDRT qualifier. The two work together to advance the mentee to MDRT-level production and membership. In turn, the Mentoring Program re-motivates MDRT members, inspiring them to increase their own productivity and further their careers.

Connect with your future

Mentoring is an impactful solution for effective, self-driven development. The MDRT Mentoring Program facilitates one-to-one relationships between MDRT member and nonmembers. This 12-month guided program will help mentees expand their network, gain knowledge and insights, and build new skills.

The program includes self-guided learning plans, goal setting, tips and resources, and milestones that help participants progress through the program. Teams can access the website and mobile app at any time and in any place, increasing the productivity of the mentoring relationship.

Benefits

FOR THE MENTEE

- GROW** your professional network
- LEARN** to handle professional challenges
- GAIN** enhanced efficiency and productivity
- INCREASE** your production
- ACCESS** a fast track to MDRT Membership

FOR THE MENTOR

- REIGNITE** passion for the business
- INCREASE** focus and production
- ADVANCE** leadership skills
- GROW** your professional network
- GIVE BACK** to the industry and to MDRT

Can a mentee attend the MDRT Annual Meeting & Global Conference?

Yes, as a mentee you have the opportunity to attend a meeting with your mentor. Please see our guide for the meeting criteria requirements. bit.org/connect/mentorship

As a mentor, what do I gain from engaging in the MDRT Mentoring Program?

75% MDRT survey showed that current mentors plan to move involved and engaged in MDRT as well as fulfill the MDRT Whole Person concept.

Mentoring teams have to live in the same city, or country?

Participants in mentoring teams can form from all over the world, as long as all parties agree to be accountable and committed to the agreements formed between them.

For more information
Contact MDRT at mentoring@mdrt.org | Visit www.mdrt.org/connect/mentorship



MDRT Peer Mentoring Program

What is the MDRT Peer Mentoring Program?

Mentoring is an impactful solution for effective, self-driven development. The MDRT Peer Mentoring Program facilitates one-to-one relationships between two MDRT members that will help you get to the next level, expand your network, and improve or learn new skills, for your future.

A one-year, online guided program that provides a personalized matching experience for two MDRT members includes self-guided learning plans, goal setting, tips and resources; and milestones that help participants progress through the program. Teams can access the website and mobile app at any time and in any place, increasing the productivity of the mentoring relationship.

BENEFITS

For the Mentor

- REIGNITE** a passion for the business
- INCREASE** your focus and production
- ADVANCE** your leadership skills
- GROW** your professional network
- GIVE BACK** to the industry and to MDRT

For the Mentee

- GROW** your professional network
- LEARN** to handle professional challenges
- GAIN** enhanced efficiency and productivity
- INCREASE** your production
- ACCESS** a fast track to MDRT Membership

RESOURCES

MDRT offers a wealth of online resources for participants in the Mentoring Program, not only on the mdrt.org/connect/mentorship, but also the following:

- Full multimedia resources at mdrt.org/team, articles, videos, webcasts and more from members, professional speakers and meeting start-ups.
- The award-winning MDRT Blog, where fresh content is posted multiple times each week. mdrt.org/blog
- Podcasts, including conversations between members about client experiences and best practices, and presentations from past MDRT Meetings. mdrt.org/podcasts and mdrt.org/presentations

FOR MORE INFORMATION
Contact MDRT at mentoring@mdrt.org or visit www.mdrt.org/connect/mentorship



MDRT

The Premier Association of Financial Professionals®

What is the mission of MDRT?

A community of continued excellence dedicated to doing 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®.

MEMBERSHIP

Requirements

Meet MDRT Production Requirements listed on mdrt.org

Join

Open enrollment is November 1 to March 1, annually.

Visit mdrt.org to learn why MDRT is the association for professionals who aspire for more.

EXCEL

"There are challenges in every business. And MDRT provides you with a network of people with the shared problems and shared opportunities where you can share ideas and insights to really help lift your business to the next level."

Dana Mitchell, CFP, CLU

MDRT benefits to your business:

MDRT members set a high bar for professional knowledge, client service and ethical standards – positioning your company to stand out in a crowded field. You'll attract qualified leads and clients who seek the best service and results from their advisors. MDRT members are supported and challenged through all stages of their careers. A sales team with a high percentage of MDRT members reflects a strong work ethic, high standard for excellence and a focus on internal development within a company that drives toward success. An MDRT member builds trust with their clients through adherence to the MDRT Code of Ethics and has many opportunities to develop their leadership skills through mentorship, speaking at MDRT events and volunteering in MDRT committees, to name a few.

Engagement opportunities for MDRT members:

MDRT has a long-standing tradition of building and upholding exceptional knowledge, client service and ethical standards through access to career-changing ideas from a supportive network of peers and an unparalleled mix of content and resources featuring proven methods and best practices for growth.

The MDRT Annual Meeting gathers thousands of members from around the world to stimulate growth through learning, networking and sharing innovative ideas. Attendees hear inspiring speakers, learn insights from some of the best minds in the world, and share their best practices and innovations with peers to help attain new levels of success.

Exclusive content:

MDRT members have exclusive access to a supportive network that equips them with career-changing ideas as well as the opportunity to create genuine connections to adapt, grow and stay accountable. They can engage with an unparalleled mix of content, best practices and the collective knowledge of MDRT members worldwide.

By using MDRT's unique Whole Person assessment, members not only become better advisors but better people – finding fulfillment beyond business and demonstrating a commitment to personal and professional development.

"MDRT is an organization that is well worth joining. I found that in the weeks following attending an MDRT meeting, I have closed more business that has more than made up for my investment in MDRT. I don't just find the same idea, it provides you with ideas and strategies that will help you become a better financial professional and help better serve your clients."

Manuel L. Solis Jr., FICS

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Printed Collateral (continued)



With You Throughout

The MDRT Family of Brands supports financial professionals reaching for more and accelerates leadership growth.



For advisors working to reach MDRT-level production. A personalized training ground with a digital-first experience. Access to leaders sharing expert knowledge and resources.



For financial advisors who have achieved high levels of production. An elite networking group with widely renowned events. Among leaders pushing each other to continue to excel.



For new field leaders of financial advisor teams. For experienced field and home office leaders to grow in skills and experience. For team leaders who are also financial advisors. For all leaders to build an MDRT culture on their teams.

MDRT MEMBER BENEFITS



Global Network
MDRT members in different countries share each other's experiences and ideas to stay ahead of the curve. The MDRT Mentoring Program provides the support you need to keep growing.



Round the Table magazine
MDRT's bimonthly publication zeroes in on trends and opportunities within the financial services profession.



MDRT App
The MDRT App, available in nine languages, delivers hand-picked material right to your fingertips and lets you interact with MDRT content and other members.



Meetings
Learn from and be inspired by the best financial services professionals from around the world at the MDRT Annual Meeting, MDRT Global Conference, MDRT EDGE and Top of the Table Annual Meeting.



Online Resources
Engage with the Collective Knowledge of MDRT member experts worldwide on mdrt.org.



Whole Person
MDRT's Whole Person concept encourages members to balance their personal and professional lives, resulting in greater total success and a more fulfilling life.



What is the mission of MDRT?

A community of continued assistance dedicated to attaining 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®.

"There are challenges in every business. And MDRT provides you with a network of people with the shared problems and shared opportunities where you can share ideas and insights to really help lift your business to the next level."

Dana Mitchell, CFP, CLU

MDRT benefits to your business:

MDRT members set a high bar for professional knowledge, client service and ethical standards – positioning your company to stand out in a crowded field. You'll attract qualified leads and clients who seek the best service and results from their advisors.

MDRT members are supported and challenged through all stages of their careers. A sales team with a high percentage of MDRT members reflects a strong work ethic, high standard for excellence and a focus on internal development within a company that drives toward success. An MDRT member builds trust with their clients through adherence to the MDRT Code of Ethics and has many opportunities to develop their leadership skills through mentorship, speaking at MDRT events and volunteering on MDRT committees, to name a few.

*MDRT is an organization that is

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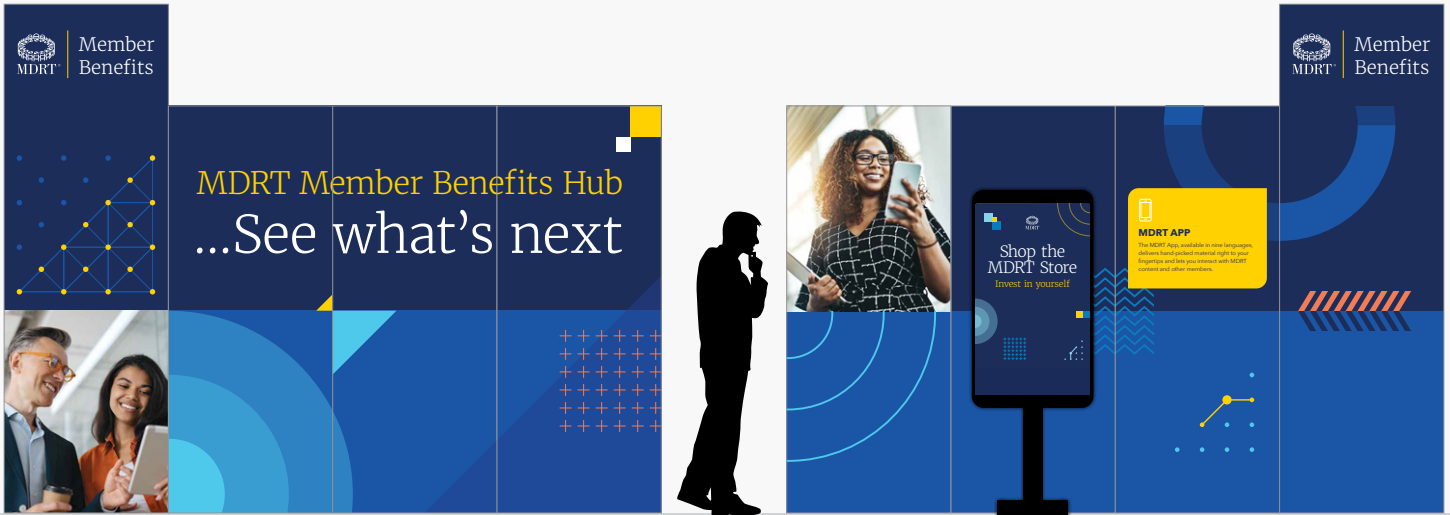
MDRT members have exclusive access to a supportive network that equips them with career-changing ideas

Booths & Signs



Back

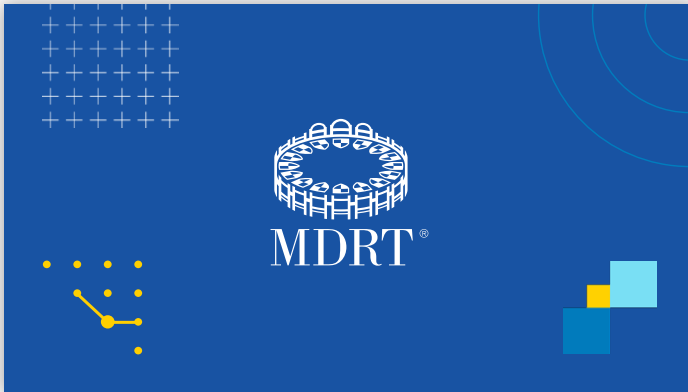
Front



Back

Front

PowerPoint Slides



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

What is the mission of MDRT?
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Manuel L. Soliz Jr., FICS

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MDRT Mentoring Program
Connect with your future!

Where do you fit in the MDRT Mentoring Programs?

- MDRT Mentor
- Peer Mentor/Mentee
- Nonmember Mentee

Why enroll in mentoring?
Whether you would like to give back or to be mentored, take your career to the next level.

- ✓ 12-month guided program
- ✓ Facilitated online matching
- ✓ Tools for setting goals
- ✓ Set milestones as a team
- ✓ Track your progress

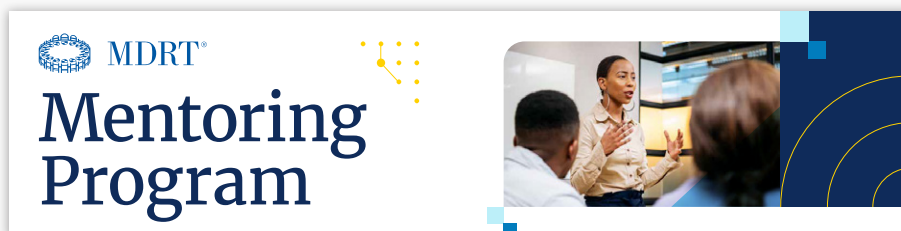
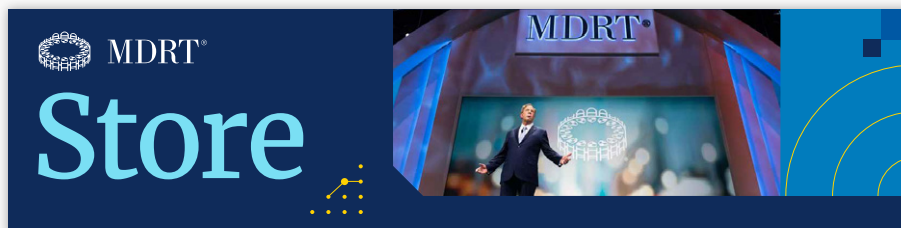
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