

2023 Conference Production Requirements

(Based on 2022 Production)

2023 Scotland Summit ¹ Aug. 23-27, 2023	Production Required	AIC/AAS GDC Credit 30% Maximum Credit ²	Life/DI Only
Summit of the Inner Circle	267,000 with 122,000 Life & DI Minimum	80,100	213,000

2023 Terranea Resort Leaders Conference April 23-27, 2023	Production Required	AIC/AAS GDC Credit 30% Maximum Credit ²	Life/DI Only
Inner Circle ³	190,000 with 48,000 Life & DI Minimum	57,000	137,000
Leaders Court ⁴	151,000	45,300	95,000
President's Club	87,000	26,100	53,000
Veterans ⁵	48,000	14,400	38,000
Associate President's Club ⁶			
Contracted in 2020	64,000	19,200	44,000
Contracted in 2021	48,000	14,400	38,000
Contracted in 2022	39,000	11,700	28,400

¹ Summit of the Inner Circle requires an 8 life and DI minimum policy count.

² AIC sales will be credited at 75% of Gross Dealer Concession and are limited to 30% of respective Club requirement. AIC GDC qualification credits for sales to Massachusetts clients or by Massachusetts financial professionals are limited to variable insurance product commissions and advisory fees.

³ Extra day (April 22) at Leaders Conference is extended to Inner Circle exclusively.

⁴ Eligibility for the Agent Non-Contributory Deferred Compensation Plan is awarded at Leaders Court qualification level and above.

⁵ Veteran status is defined as the sum of the age plus years of conference qualification to equal 75 or more. The minimum age must be at least 60 and the cumulative years of club qualification must be a minimum of 10 for a combined total of 75.

⁶ Associate status is defined as individuals new to the industry and eligible for new agent financing programs. Associates must also have satisfied his/her Agent Contract production requirement.

Reduction in Required Production allowed in 2022

The requirements in the charts above can be reduced by 5% if the associate has qualified for Leaders Conference 10+ years.

Tenure (10+ Years Conference Qualification)

5%

Paid life policy credit

Paid Life Policies	Conference Credit
10	1,000
20	2,500
30	4,000
40	6,000
50	10,000

Note: Focus 10 policies receive one credit for each five policies. Split cases will be credited based on the percentage of the policy.

Conference Production Crediting

- Individual life and DI will receive 100% of FYC.
- Group dental and vision insurance will be credited at 100% paid first year commissions.
- Fixed annuities will be credited at 3% of commissionable deposits.
- Representatives affiliated with outside Broker/Dealers must qualify for non-cash benefits based exclusively on the fixed life and annuity business offered through affiliates of Ameritas. Necessary adjustments will be made at year end to exclude variable products.

Please Note: The production credit formula differs from Agent Contract validation.

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