



# *Because of you...*

Your Fall 2015 Activities Updates from MDRT Foundation Canada



# We went to New Orleans, and we gave back

You yourself might not have been there in person, but the contributions you make to your Foundation make good works like the New Orleans Service Project possible. And for those of us from MDRT Foundation Canada who did help rebuild homes it was an unforgettable experience. *Will we see you in Vancouver, June 12-15, 2016?*



Your MDRT Foundation Canada dollars continue to help a Canadian Red Cross shelter for children



operate on a narrow plateau on the side of a mountain in Dhunche, Nepal.

You don't hear much about the earthquake in Nepal anymore, but through the generosity of members like you in response to our emergency email

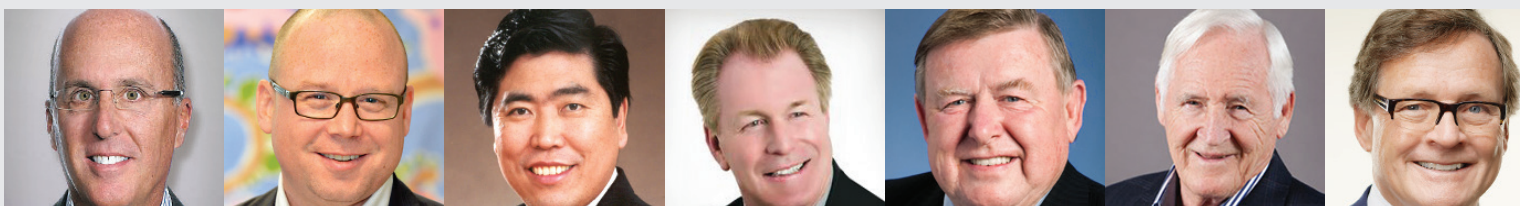
campaign appeal, these children have not been forgotten. We donated \$6,550. Now that's what you call paying it forward!



MDRT Speakers highlighted at Canada Sales Congress in Toronto this past May

The Canada Sales Congress is a one-day industry conference that focuses on sales performance, client communication and business development. Attending is a great way to get insurance product sales ideas and different perspectives on success from advisors at the top of their game. It comes as no surprise then that when the 2015 Canada Sales Congress went looking for professional speakers or "Sales Masters," 12 of these speakers are members of MDRT.

**CANADA  
SALES CONGRESS**



# Giving is the new key marketing tool for Fortune 500 companies

Everywhere you turn these days, on the web, on TV, in your favourite newspaper or magazine, you see another story about corporate enterprise giving back.

Giving Back visibility in terms of charitable donations has always been a component of corporate budgets, but in today's economic climate and social consciousness it has also become a crucial ingredient to branding success—even survival.

For MDRT Foundation Canada members, your clients want to see you stepping up and giving back to your local community.

Your Foundation is the perfect vehicle for elevating your profile as a caring spirit, while raising the integrity of the entire life insurance profession through your philanthropic efforts.

MDRTFC's short term fundraising goal is \$1,000,000 and long term it's \$5,000,000. That's a lot of good will!

We also have a corporate sponsorship focus this year, and are seeking to build on our volunteer and community engagement through our ambitious Major Gifts Strategic Plan, which leverages our national strength as a brand to help position us as the charity of choice for major gifts and corporate partnerships.

*Richard E. Lee  
President, MDRT Foundation Canada*

**MDRT**  
FOUNDATION  
CANADA



The Phone-A-Thon is coming, Sept 21-22!  
Please get ready to volunteer your time  
or give generously

Sponsored by  
**Manulife Financial**

## Thank you Frank!

Our heartfelt gratitude and congratulations go out to Frank Creaghan: our first ever legion of Honour Excalibur Knight and also an Inner Circle Knight.



## Thank you Paul!

With great gratitude MDRT Foundation Canada, Board Member Serge Morel accepts a \$5000 donation from Diamond Knight and Inner Circle Knight Paul Marchard.



## Your Foundation just keeps on giving!

Shawn Anchor, keynote speaker at our Annual MDRT meeting in New Orleans quoted from 13th century St Francis Assisi, "Grant that I may not seek to be consoled as to console; To be understood as to understand; to be loved as to love; for it is in **giving that we receive.**" What a fitting quote for MDRTFC members who know about elevating those in need, who grant hope and strength in their communities. I am always humbled by the generosity of spirit.

It's been a busy year already, and we're hoping to close it out with a record level of donations and granting of hope at the grass-roots level in communities across Canada. Our Foundation President Richard Lee has identified the important connection between corporate philanthropy and brand success that is gaining momentum in Canada and around the world. What a wonderful time to get involved with MDRT Foundation Canada! Please get in touch with the office ([info@cmdrtfoundation.org](mailto:info@cmdrtfoundation.org) or 1-800-563-5822 ext. 9878) and let us help you help others in your community by lending your support as a canvasser at the upcoming Phone-A-Thon or Christmas Campaign!

*Joanne E. Taylor, Executive Director, MDRT Foundation Canada*

# Members Corner...

## How can I get to the next level?

I was originally referred to Karl Krokosinski of Customplan Financial in Vancouver by a business coach who told me that Karl was a top person in the financial industry. What he meant was that Karl is a TOT member of MDRT who loves to help advisors succeed. I didn't know what MDRT was at the time, but Karl said it should be my #1 goal to qualify and attend the next MDRT meeting. So I did. My first MDRT meeting was in Boston in 1994 and I've been attending the annual meetings ever since. I volunteered to play music in one of the MDRT bands the next year in Dallas TX. I've been playing music with Steve Plewes (TOT/Guitar player) for 21 years now. I have made some wonderful lifelong friendships within MDRT both through volunteering to serve on committees and task forces and through connecting with people during the meetings.

One of the attributes that belonging to MDRT has fostered in me is the desire to give back or pay it forward: to my colleagues, my clients, my community and those who are less fortunate. Early on, I began to donate money each year to our foundation. At one point I discovered that, as a donor I could sponsor a grant application for a favorite charity. My oldest daughter Sarah was volunteering at a school for hearing impaired children at the time so I helped the school apply for and receive a grant from our MDRTCF. This was a wonderful example for my daughter of how we can help make the world a better place through volunteering and through our finances.

About ten years ago while meeting with Karl, I asked

him "How can I get myself to the next level at MDRT?" – Court of the Table. I had developed an area of specialization and was looking to expand my practice. Karl suggested I show my ideas to my colleagues and ask them to introduce me to their clients who might benefit from the idea. Karl led by example and referred me to several of his clients. These additional joint cases or collaborations led to my first COT qualification.

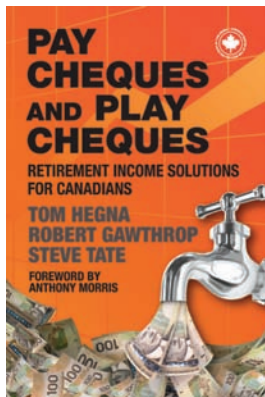
In 2010 I heard Tom Hegna's message on the main platform at the Vancouver MDRT meeting (my home town). His talk on paychecks and playchecks and a worry free retirement was one of the most impactful talks I'd ever heard. Tom wrote his book "Paychecks & Playchecks" in 2011 and it soon became a best seller in the US. Karl read Tom's book and recognized that, although Canadians should read it, they likely would

not buy it because it was U.S. based. "Why don't you re-write Tom's book for Canadians?", he suggested. It took several months of Karl's prompting, but eventually my colleague, Steve Tate, and I collaborated with Tom Hegna and published the Canadian version: "Pay Cheques & Play Cheques".

MDRT has taught me to volunteer with my time and resources. It has taught me to share my knowledge with my colleagues, to specialize and do what I love and delegate the rest. I have

learned from some of the masters that went before me – MDRT has many. Find a mentor, become a mentor. Give back, specialize, and collaborate. Always be grateful and help those who need help.

*Rob Gawthrop, Bronze Knight*



## Tell your clients your story, including being a member of MDRT Foundation Canada

Many years ago while attending a funeral of a dear client and friend; I realized as I looked around the room that I was the only person there who would have money for the widow and the children. All the people there, paying their respects, offering condolences such as "sorry to hear of your loss"; "let me know if we can be of any help" –glib comments.

During my paying this visit, the widow introduced me to all the family members and friends as their Insurance Representative, and told them how grateful she was to me and told them the mortgage is paid plus that she would be receiving a monthly income to provide for her and the children. Thanks to Stephen J. Pustai.

This had a profound emotional effect on me knowing we do make a difference in people's lives to this day.

As MDRT members, we need to tell the story about what we do. Telling a good story is a powerful leadership tool, especially when it's from the heart.

*Stephen J Pustai, Diamond Knight*

## The starfish

**An unusually high tide had stranded thousands of starfish on the sandy beach and without water they were going to die. As I walked along the beach I saw a young man picking up starfish and throwing them (one at a time) back into the water.**

**I said to him; "There are thousands of starfish on the beach. You can't possibly make a difference to save them all".**

**He picked up another starfish and threw it back into the ocean. "I made a difference to that one!"**

**This is how we help those in need.**

**Rob Gawthrop, Bronze Knight**

**Make a gift on line: [cmdrtfoundation.org](http://cmdrtfoundation.org)** You want to contribute, and give your life more meaning. But you simply don't know anyone at a deserving charity, and don't have the time to research one. As a contributing Knight, you can take comfort in knowing that your Foundation Board also responds to international disasters and other worthy causes by sending money on behalf of all members. There are 3 ways you can participate online: **DONATE ANY TIME.** With our PayPal secured online transactions you can make a donation with your credit card anytime for almost any amount. **SET UP A RECURRING DONATION.** You won't even miss the money each month! **MAKE A TRIBUTE GIFT** in honour of someone you love.

**A Million Thanks To Our Generous Corporate Sponsors:**



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