



2023

Finseca

Leadership Awards

Applications Due April 1, 2023

[Click Here To Apply](#)



You compete every day

Be recognized for it.

Finseca's professional awards honor agency leadership and individual leaders whose passion, talent and expertise make the greatest contributions to the financial security profession. You can honor the best of the best in leadership when you nominate an agency or individual for one of these prestigious awards.

Recognition & visibility

Showcase your production status through a digital badge and recognition at LAMP 2023.

Career benefits

Winning awards should not only help your personal brand but can also potentially lead to salary increases, promotions, and external speaking opportunities.

Increase Your Personal Brand

Winning a Finseca Leadership Award will elevate your credibility within the profession and highlight your agency's success.

Increase your planning

Winning an award requires a plan, and that plan can be a driver to increase other formal planning efforts that allow you to identify problems, needs, and opportunities.

2023 Awards

Master Agency Award or Master Firm Award - Master Agency Awards are given to an agency head that is a Finseca member at a firm with at least \$7,800,000 USD in commission levels or \$15,600,000 USD in premium levels during the previous year.

Master Multiline Award - The Master Multiline Award is given to an agency head that is a Finseca member with an agency or firm that achieved at least \$300,000 USD in gross life and annuity premiums and at least \$10,000,000 USD in gross property and casualty premiums during the previous year.

Community Impact Award - The Community Impact Leadership Award honors financial security firms/agencies that are having a tangible, measurable effect on their clients and their communities. That impact might be the result of a number of activities, such as lives secured, charitable efforts or DE&I initiatives that promote doing well by doing good.

Management Hall of Fame - Inductees to Finseca's Management Hall of Fame are not only experts at building world-class agencies or firms, they also elevate the financial security profession by serving and educating their communities, championing professional development, and generally advancing the mission and work of the profession. (You must be nominated by a home office to qualify for this award. Individual application will not be accepted.)

Finseca Futures: Leadership Track - When you ask the iconic leaders of the financial security profession about how they grew successful businesses and teams, almost all mention the help of mentors and peers. The Finseca Futures program is designed to provide access to networks and training that leaders need to thrive in the early years (0-5 years in leadership) of their career. (This program requires a fee.)

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Finseca

Master Firm/Agency Award Criteria

Master Agency Award (MAA) & Master Firm Award (MFA)

Master Agency Awards are given to an agency head that is a Finseca member at a firm with at least \$7,800,000 USD in commission levels or \$15,600,000 USD in premium levels during the previous year.

Award Criteria

| Award | Min Qualifying Commissions (USD) | Min Qualifying Premiums (USD) |
|---|----------------------------------|-------------------------------|
| Master Agency Award & Master Firm Award | \$7,800,000 | \$15,600,000 |

- Applicants must meet all general requirements including being a Finseca member.
- Must be agency heads (first-line manager).
- Only applications from a main or central office representing an entire agency/firm will qualify.
- FYC paid to the direct or indirect agents supervised by the applicant will be counted.

Directions

Compute total commissions or total premiums from January 1, 2022, to December 31, 2022, based on the formula in the table below. **Please reference the Eligible Product Credit Table on the next page to help determine your eligible commissions or premiums.**

Use only new first-year commissions/premiums when computing. Life insurance commissions/premiums must be at least 50% of total commissions/premiums for the Ordinary/Traditional. Please report all data, including commissions/premiums and total commissions/premiums.

Application

| | | | | | |
|--|---|-------------------------------------|---|--------|---------|
| 2022 Unlimited Credit (USD) (must be at least 50% of total commissions/premiums) | | | | | |
| 2022 Limited Credit (USD) | | | | | |
| 2022 P&C Commissions/Premiums (USD) | | | | | |
| 2022 Gross P&C Commissions/Premiums | - | 2021 Gross P&C Commissions/Premiums | = | Growth | X 50% = |
| | | | | | + |
| Total Commissions/Premiums (USD)) | | | | | |

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Eligible production credit table

This reference guide contains formulas that will help determine your total eligible commissions or premiums. To determine what production credits are eligible to be included toward your Finseca Leadership Award, please refer to the table below.

| Unlimited Credit | Commission/Fee Credit | Premium Credit |
|---|--|----------------------------|
| Accidental death and dismemberment (individual) | 100% of first year commission | 100% of first year premium |
| Critical illness (individual) | 100% of first year commission | 100% of first year premium |
| Disability income contracts (individual) | 100% of first year commission | 100% of first year premium |
| Life (individual) | | |
| Up to annual premium/target premium | 100% of first year commission | 100% of first year premium |
| Deposits in excess of annual/target premium/top up | 100% of commission paid | 6% of excess premium |
| Single premium (whole life and investment) | 100% of first year commission | 6% of first year premium |
| Short-term endowment rider (max. 15 years) | 100% of first year commission | 6% of first year premium |
| Long-term care (individual) | 100% of first year commission | 100% of first year premium |
| Accidental death and dismemberment (group) | 100% of first year commission | 10% of first year premium |
| Critical illness (group) | 100% of first year commission | 10% of first year premium |
| Disability income contracts (group) | 100% of first year commission | 10% of first year premium |
| Life (group) | 100% of first year commission | 10% of first year premium |
| Long-term care (group) | 100% of first year commission | 10% of first year premium |
| Annuities (individual/group) | 100% of all commissions | 6% of new money invested |
| Single premium/short-term endowment (max. 15 years) | 100% of first year commission | 6% of first year premium |
| Limited Credit | Commission/Fee Credit | Premium Credit |
| Health care (individual) | 100% of first year commission | 100% of first year premium |
| Health care (group) | 100% of first year commission | 10% of first year premium |
| Mutual funds | 100% of all commissions | 6% of new money invested |
| Securities | 100% of commission on new money invested | 6% of new money invested |
| Wrap accounts/asset management accounts | 100% of all commissions | 6% of new money invested |
| Financial planning fees/fees for advice | 100% of the net fee | 100% of the gross fee |

PRESS & SOCIAL MEDIA ANNOUNCEMENTS

As a condition of receiving this award, nominees must agree to be included in all press, social media and website announcements.

AWARD RECOGNITION

Awards will be presented in May 2023 at our Annual LAMP Conference in Las Vegas. Awardees will be notified one week after the application period closes.

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Finseca

Master Multiline Award Criteria

Master Multiline Award (MMA)

The Master Multiline Award is given to an agency head that is a Finseca member with an agency or firm that achieved at least \$300,000 USD in gross life and annuity premiums and at least \$10,000,000 USD in gross property and casualty premiums during the previous year.

Award Criteria

- Applicants must meet all general requirements including being a Finseca member.
- Must be agency heads (first-line manager).
- Only applications from a main or central office representing an entire agency/firm will qualify.
- FYC paid to the direct or indirect agents supervised by the applicant will be counted.

Directions

Compute total commissions or total premiums from January 1, 2022, to December 31, 2022, based on the formula in the table below. Please reference the Eligible Product Credit Table on the next page to help determine your eligible commissions or premiums.

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Application

| | |
|----------------------------|--|
| 2022 Gross Life Premium | |
| 2022 Gross Annuity Premium | |
| 2022 Gross P&C Premium | |

| | | | | |
|--|---|-------------------------------------|---|---------|
| 2022 Unlimited Credit (USD) (must be at least 50% of total commissions/premiums) | | | | |
| 2022 Limited Credit (USD) | | | | |
| 2022 P&C Commissions/Premiums (USD) | | | | |
| 2022 Gross P&C Commissions/Premiums | - | 2021 Gross P&C Commissions/Premiums | = | Growth |
| | | | | X 50% = |
| | | | | |
| Total Commissions/Premiums (USD)) | | | | + |

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| Life (individual) | | |
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| Single premium (whole life and investment) | 100% of first year commission | 6% of first year premium |
| Short-term endowment rider (max. 15 years) | 100% of first year commission | 6% of first year premium |
| Long-term care (individual) | 100% of first year commission | 100% of first year premium |
| Accidental death and dismemberment (group) | 100% of first year commission | 10% of first year premium |
| Critical illness (group) | 100% of first year commission | 10% of first year premium |
| Disability income contracts (group) | 100% of first year commission | 10% of first year premium |
| Life (group) | 100% of first year commission | 10% of first year premium |
| Long-term care (group) | 100% of first year commission | 10% of first year premium |
| Annuities (individual/group) | 100% of all commissions | 6% of new money invested |
| Single premium/short-term endowment (max. 15 years) | 100% of first year commission | 6% of first year premium |
| Limited Credit | Commission/Fee Credit | Premium Credit |
| Health care (individual) | 100% of first year commission | 100% of first year premium |
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Community Impact Award Criteria

Community Impact Leadership Awards (Individual Firms making an impact)

The Community Impact Leadership Award honors financial security firms/agencies that are having a tangible, measurable effect on their clients and their communities. That impact might be the result of a number of activities, such as lives secured, charitable efforts or DE&I initiatives that promote doing well by doing good.

Recognition Criteria:

- Firms/agencies who are making an impact with their clients, in their local communities and in their agencies/firms.
- General Agents/Managing Partners must be a Finseca member.
- Those who sit on the Recognition Committee or on the Board of Directors of Finseca and the Finseca Foundation are not eligible.

The Selection Committee will consider the following questions when evaluating applications.

- Lives Secured
 - How many lives secured in 2022?
 - How many of those lives were from historically undeserved communities?
- Charitable Initiatives
 - How did your firm positively impact one or more important areas like culture, education, environment, financial, and/or health that have proven meaningful for your community?
- Diversity, Equity & Inclusion
 - Have you made DE&I a priority in your firm?
 - Share your story.
 - Multiple dimensions of diversity among staff, leadership, and governance.
 - Firm/agency-wide and community training initiatives (e.g., anti-racism, gender inclusivity)
 - Demonstration of or advocacy for equitable access to financial services for communities that have faced exclusion or marginalization.

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Finseca

Finseca Futures: Leadership Track



Welcome to Finseca Futures!



Giving the profession's future access to the network and training they need to thrive in the early years of their leadership journey.

www.finseca.org

What is Finseca Futures?

When you ask the iconic leaders of the financial security profession about how they grew successful businesses and teams, almost all mention the help of mentors and peers. The Finseca Futures program is designed to provide access to networks and training that leaders need to thrive in the early years of their career.

With a specific focus on gen z, millennials, people of color, and women this program strives to address the unique needs of those who are not widely recognized in our profession. Through event attendance, custom designed courses, and impactful networking opportunities, you will deepen your connection to our profession and create lasting relationships.

Participation Criteria

- 0-5 years in a leadership role in the financial security profession
- A commitment to attending the Finseca Conference associated with the Finseca Futures Leadership Track - LAMP 2023, April 30-May 2 2023, Las Vegas

Ideal Finseca Future Leaders participants are leaders or managers organizations are committed to developing. The ideal participant is passionate about leading and developing financial security professionals and is proactive when it comes to seeking out leadership development opportunities for him or herself.

Program Benefits

Program Price: \$1,500 per person

1. **Virtual Workshop:** Personal Branding and Making a Conference Worth the Investment.
2. **Complimentary Registration** to Finseca's LAMP 2023 conference in Las Vegas.
3. **Invitation** to exclusive networking and educational programming at Finseca's LAMP 2023 conference, including a Kick-off Breakfast.
4. **Three-part career development workshop series** and supporting resources. Topics include:
 - a. Leadership Fundamentals and Prioritization.
 - b. The Fundamentals of Recruiting and Selection.
 - c. Building a High Expectations & Trust Culture.
5. **Priority access** to speaking opportunities at LAMP 2024.
6. **Discount** on Finseca Membership.

Contact the Vice President, Corporate Partnerships,
Barbara Lecker at blecker@finseca.org with questions.





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**Please contact Megan Bronner at
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