

Dr. JEROME  
JOSEPH | SPEAKER  
STRATEGIST  
AUTHOR

# THE PATH TO MDRT™

A High-Performance, Brand-Driven  
Growth System in the Age of AI  
*For Financial Planners*



MDRT

MDRT

*Designed for planners building towards MDRT and MDRT  
achievers scaling towards COT and TOT.  
Think differently. Position strategically.  
Sell confidently and scale in the Age of AI.*

GLOBAL  
BRAND  
ACADEMY  
Creating Branded People

# Why The Path to MDRT™ Exists

In today's market, financial planners are no longer competing on product knowledge alone.

They are competing on:

- Trust and credibility
- Positioning and visibility
- Conversation quality
- Confidence in selling — in an AI-driven world

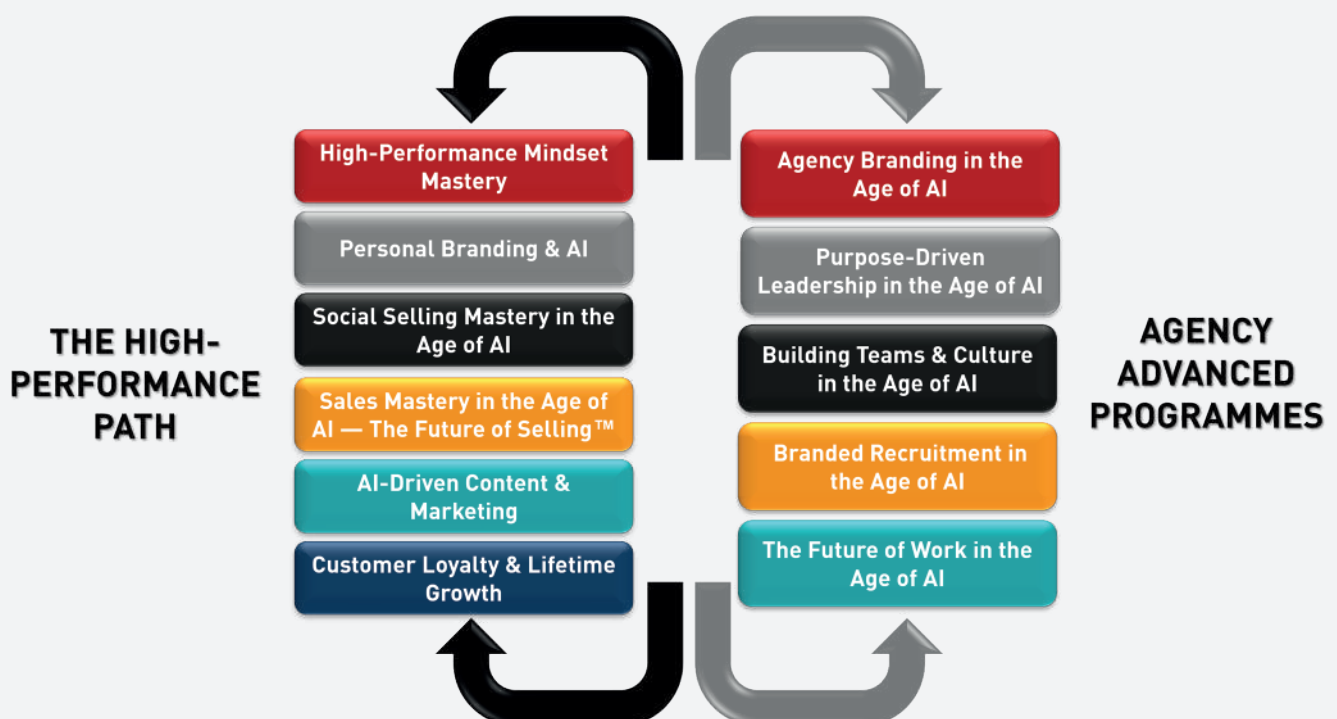
**The Path to MDRT™ is not a one-off training.**

It is a **high-performance ecosystem** designed to build the capabilities that consistently drive production — whether you are aiming for MDRT, sustaining MDRT, or scaling towards COT and TOT.

**Who This Ecosystem Is For**

- **Pre-MDRT planners** who want a clear, modern path to consistent production
- **MDRT achievers** who want sharper systems, stronger positioning, and repeat performance
- **COT / TOT aspirants** scaling through brand authority, strategic selling, AI leverage, and lifetime client value
- **Team leads and agency leaders** building future-ready teams, culture, and recruitment pipelines

## THE PATH TO MDRT™ ECOSYSTEM MODEL



## The Architect Behind The Path to MDRT™

**Dr Jerome Joseph, CSP**, Global Speaking Fellow  
Hall of Fame Speaker · Global Brand Strategist · Best-Selling Author – Global Thought Leader

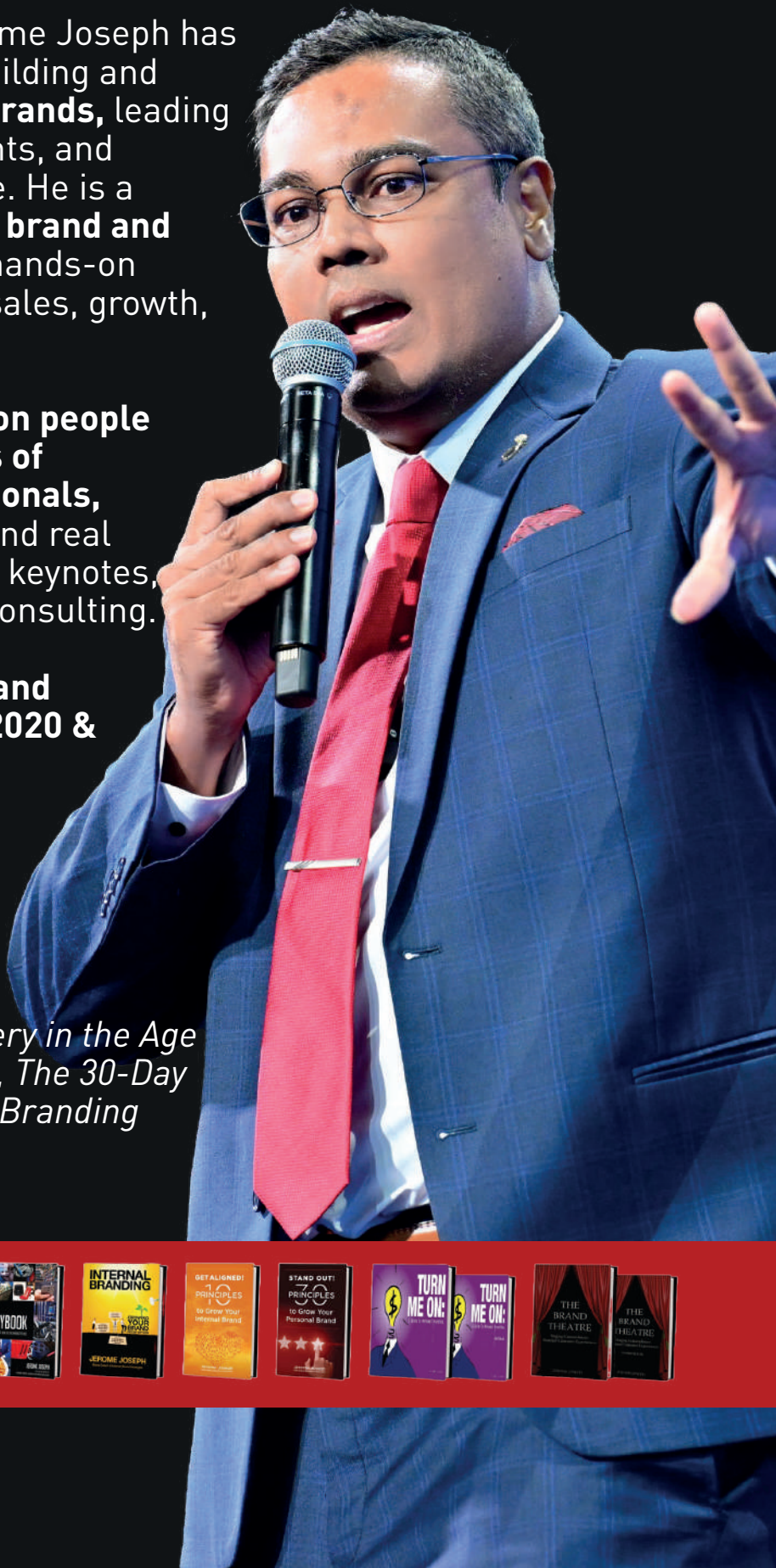
Over the past **30 years**, Dr Jerome Joseph has worked across **40 countries**, building and advising **multi-million-dollar brands**, leading complex consulting engagements, and delivering programmes at scale. He is a **former CEO of a publicly listed brand and consulting agency**, with deep, hands-on experience spanning strategy, sales, growth, and performance

He has impacted **over 1.2 million people worldwide**, including **hundreds of thousands of financial professionals**, entrepreneurs, sales leaders, and real estate professionals — through keynotes, masterclasses, coaching, and consulting.

He was ranked **No. 2 Global Brand Thought Leader in the world (2020 & 2022)** — the only Asian on this global list.

### Best-Selling Author & Thought Leader

Dr Jerome is the **best-selling author of 12 books**, including: *The Brand Playbook*, *Sales Mastery in the Age of AI / Sales Mastery AI Playbook*, *The 30-Day AI Personal Brand Plan*, *Internal Branding*



# THE PATH TO MDRT™ ECOSYSTEM MODEL

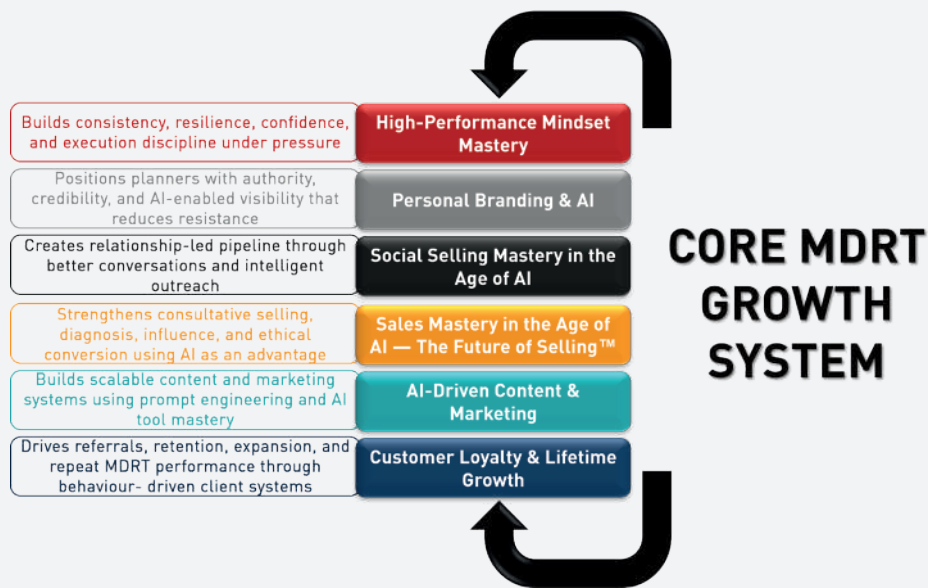
## HOW THE SYSTEM WORKS

The ecosystem is built in **two clear parts**, designed for different stages of growth.

### PART 1: THE HIGH-PERFORMANCE PATH

For planners building towards MDRT — and MDRT achievers scaling towards COT / TOT

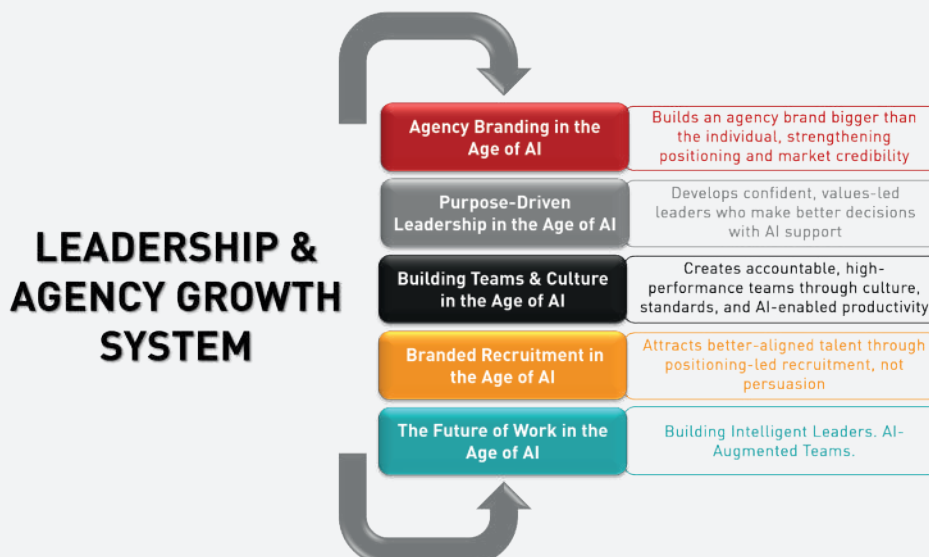
*This path builds the core capabilities required for consistent production in a trust-based, AI-driven market.*



### PART 2: AGENCY ADVANCED PROGRAMMES

For team leads, agency builders, and agency leaders

*This path builds leadership, leverage, and scale beyond individual production.*



# THE HIGH-PERFORMANCE PATH

## ***Building MDRT, Sustaining MDRT, Scaling to COT & TOT***

The High-Performance Path is the **core growth system** within The Path to MDRT™. It is designed for financial planners who want **consistent production**, not short-term spikes.

Each programme strengthens a specific capability that directly impacts performance in a trust-based, AI-driven market.

## **HIGH-PERFORMANCE MINDSET MASTERY**

### **The Inner Game of MDRT Performers**

MDRT performance is driven by mindset before mechanics. This programme builds the mental discipline required to perform consistently in a rejection-heavy, target-driven profession.

Planners develop:

- Emotional control under pressure
- Confidence in value and recommendations
- Consistent execution habits, regardless of mood or market conditions

This is where performance becomes **repeatable**, not reactive.

## **PERSONAL BRANDING & AI**

### **Building Authority, Trust & Opportunity**

In today's market, planners are evaluated before the meeting. This programme helps planners intentionally shape how they are perceived — and use AI intelligently to amplify visibility without sounding generic.

Planners learn how to:

- Position themselves clearly in a crowded market
- Communicate credibility and authority with confidence
- Reduce resistance and shorten trust-building cycles

This is where visibility turns into **pre-sold trust**.

## **SOCIAL SELLING MASTERY IN THE AGE OF AI**

### **Building Relationships, Conversations & Pipeline**

Modern clients trust familiarity over persuasion. This programme equips planners with a structured, professional approach to building relationships and generating conversations through digital platforms — supported by AI for insight and relevance.

Planners develop:

- Confident, natural outreach habits
- Relationship-led pipeline building
- Consistent prospecting rhythms without cold-call fatigue

This is where connections turn into **conversations**.

# THE HIGH-PERFORMANCE PATH

## SALES MASTERY IN THE AGE OF AI — THE FUTURE OF SELLING™

### Consultative Selling That Converts with Credibility

Selling today is no longer about scripts or pressure. This programme strengthens the ability to lead confident, consultative sales conversations — supported by AI, not replaced by it.

Planners learn how to:

- Diagnose needs deeply and professionally
- Influence decisions with clarity and trust
- Handle objections and commitment without desperation

This is where conversations lead to **decisions**.

## AI-DRIVEN CONTENT & MARKETING

### Creating Demand at Scale Without Burnout

Content alone does not create growth — systems do. This programme shows planners how to use AI to build high-impact content and marketing workflows that support sales, social selling, and visibility.

Planners develop:

- Structured prompt-engineering skills
- Repeatable content systems
- Consistency without overwhelm or loss of credibility

This is where effort becomes **leverage**.

## CUSTOMER LOYALTY & LIFETIME GROWTH

### Turning Clients into Long-Term Value

Sustained MDRT performance is built after the sale. This programme helps planners intentionally design how clients experience, engage, stay, and grow over time — supported by behavioural insight and AI-enabled personalisation.

Planners learn how to:

- Understand client behaviour and decision patterns
- Design intentional customer journeys
- Build referral, retention, and expansion systems

This is where success becomes **sustainable**.

**The High-Performance Path builds the capabilities that drive consistent production from mindset and positioning to selling, loyalty, and lifetime growth.**

# AGENCY & LEADERSHIP GROWTH

## ***Scaling Beyond Individual Production in the Age of AI***

The second part of **The Path to MDRT™** is designed for financial professionals who are ready to move beyond individual success — and build **scale, leverage, and long-term organisational impact**.

This path is ideal for:

- MDRT performers moving into leadership
- COT / TOT aspirants seeking leverage beyond personal effort
- Team leaders and agency managers
- Agency builders shaping future-ready organisations

These programmes strengthen **brand, leadership, culture, and recruitment** — the pillars required to scale performance across people and teams.

## **AGENCY BRANDING IN THE AGE OF AI**

### **Building a Brand Bigger Than the Individual**

High-performing agencies are not just productive — they are clearly positioned. This programme helps agency leaders intentionally define how their agency is perceived by clients, advisors, and the market.

Leaders learn how to:

- Clarify a strong agency positioning and identity
- Differentiate in a competitive, commoditised market
- Build credibility that attracts both clients and talent
- Use AI to amplify consistency and visibility across the agency

This is where agencies move from *groups of advisors* to **destination brands**.

## **PURPOSE-DRIVEN LEADERSHIP IN THE AGE OF AI**

### **Leading with Clarity, Confidence & Values**

AI is changing how decisions are made — but leadership is still human. This programme strengthens leadership clarity, judgement, and communication in a fast-changing, high-pressure environment.

Leaders develop:

- Stronger decision-making supported by AI, not replaced by it
- Clear leadership direction anchored in values and purpose
- The ability to lead people confidently through change and uncertainty

This is where leadership becomes **intentional, trusted, and steady**.

# AGENCY & LEADERSHIP GROWTH

## BUILDING TEAMS & CULTURE IN THE AGE OF AI

### Creating High-Performance, Accountable Teams

Performance does not scale through systems alone — it scales through culture. This programme helps leaders intentionally design environments where people perform, collaborate, and grow.

Leaders learn how to:

- Build accountability, ownership, and performance standards
- Strengthen collaboration and engagement
- Use AI to support productivity, learning, and communication
- Create a culture that attracts, develops, and retains talent

This is where culture becomes a **competitive advantage**.

## BRANDED RECRUITMENT IN THE AGE OF AI

### Attracting Talent Through Positioning, Not Persuasion

The best advisors are not convinced — they are attracted. This programme helps agencies move away from transactional recruitment tactics and toward brand-led, value-driven recruitment.

Leaders learn how to:

- Build a compelling recruitment value proposition
- Position leadership, culture, and opportunity clearly
- Attract higher-quality, better-aligned advisors
- Use AI to scale recruitment messaging without losing credibility

This is where recruitment becomes **selective, strategic, and sustainable**.

## THE FUTURE OF WORK IN THE AGE OF AI

### Building Intelligent Leaders. AI-Augmented Teams.

The future of performance will not be driven by AI alone — it will be driven by people who know how to use AI intelligently. This programme equips leaders and professionals with the practical capability to integrate AI into decision-making, communication, productivity, and strategic execution.

Leaders learn how to:

- Master prompt engineering to think, analyse, and communicate with precision
- Use AI tools for decision-making, research, and strategic analysis
- Build simple AI agents to automate workflows and increase productivity
- Apply AI for presentations, marketing content, and professional communication
- Design an AI-enabled personal productivity ecosystem
- Strengthen critical thinking and judgement in an AI-augmented workplace

This is where AI becomes a **performance multiplier** — not just a productivity tool.

**The Agency Advanced Programmes are designed for leaders who want to scale performance beyond themselves — by building strong brands, confident leaders, high-performing teams, and future-ready agencies.**

## WHERE CAPABILITY BECOMES RESULTS

MDRT, COT, and TOT are not achieved by effort alone.

They are achieved through **clear capability, disciplined execution, and a strategic growth system.**

**The Path to MDRT™** is designed to help financial planners:

- Build confidence and consistency under pressure
- Position themselves with clarity and credibility
- Sell consultatively in a modern, AI-driven environment
- Create repeatable performance — not one-off results

This is not a programme.

It is a **pathway to sustained performance and scale.**

## HOW ORGANISATIONS TYPICALLY WORK WITH US



# TESTIMONIALS OF OUR WORK

## Trusted by the Financial Services Industry Real Voices. Real Impact. Real Results.

For over **30 years**, **Global Brand Academy**, led by **Dr Jerome Joseph**, has worked with **1,000+ brands** across **40+ countries**, partnering with financial professionals, agency leaders, and institutions to build credibility, influence, and sustainable performance.

### Selected Financial Clients

**Prudential • Manulife • AIA • Great Eastern • NTUC Income • OCBC • UOB • HSBC • AXA • PIAS • DBS**



**Suzanna Alias** - 2nd

Associate Islamic Finance Practitioner | Islamic Estate Planner | Retirement & Financial Planning Specialist | Guiding Families from Survival to Legacy | Dedicated to Empower Single Mothers and Build Generational Wealth  
October 11, 2025, Suzanna was Dr. Jerome's client

So grateful for mentors who don't just teach, but transform the way you think.

Dr Jerome's lessons on branding have been a true eye-opener — helping me show up more confidently and authentically on social media. Sharing my appreciation below 🙌

I'm sincerely grateful to Dr Jerome for his inspiring and insightful lessons on branding. His depth of knowledge, coupled with his engaging teaching style, made every session a meaningful learning experience. I truly appreciate how he breaks down complex branding concepts into clear, actionable steps that empower professionals to refine their message and elevate their presence on social media.

Dr Jerome's guidance has not only sharpened my understanding of personal branding but also inspired me to show up more confidently and authentically online. Thank you, Dr Jerome, for your generosity in sharing your expertise and for making such a lasting impact.

— Suzanna Alias | Islamic Estate Planner | Retirement Specialist | Advocate to Single Mothers to Empower Their Lives and Build Their Wealth



**Eric Quek Jiang Woel** - 2nd

Financial Services Manager | Insurance Agent | Financial Consultant  
October 3, 2025, Eric was Dr. Jerome's client

I had attended Dr Jerome's branding workshop and it opened my perspective about branding. He was able to use simple terms to explain complicated branding and marketing concepts. Following his system and guidance will get anyone started on their branding journey. Strongly recommend if you are thinking of starting your branding journey.



**Cordelia Lim** - 2nd

Wealth Manager for Women & Families | Gentle, thoughtful guidance to help you feel steady, supported, and quietly confident about your financial future  
June 3, 2025, Cordelia was Dr. Jerome's client

Jerome's Brand Mastery Programme is a game changer!

What sets it apart is Jerome himself—he's not just a teacher, but a true practitioner and master of branding. The programme is packed with hands-on, practical guidance that bridges the gap between theory and execution. Every session was rich with real-world insights I could immediately apply to my business. If you're serious about building a brand that stands out and connects, this is the programme to invest in.



**Yong Chuan Tan** - 2nd

Senior Executive Financial Consultant | MDRT x 5 | Court of Table (COT) 2025 | Mentor  
January 9, 2024, Yong Chuan was Dr. Jerome's client

I am delighted to provide a glowing testimonial for Dr. Jerome Joseph, whose expertise in providing clear direction and precise mentoring has significantly impacted my personal branding journey.

Dr. Jerome stands out for his emphasis on self-discovery, a crucial aspect that sets the foundation for a successful personal and corporate brand. Through his guidance, I have gained invaluable insights into understanding myself and my brand, paving the way for authentic and meaningful representation.

His method involves a comprehensive analysis of individual strengths and unique brand attributes, ensuring a tailored and impactful strategy for success.

On a personal level, working with Dr. Jerome has been an enriching experience.

His professionalism is matched by a genuine and approachable demeanor, making collaboration enjoyable and stress-free.

In conclusion, it has been a privilege to work with Dr. Jerome Joseph. I highly recommend Dr. Jerome to anyone seeking transformative guidance in their personal or corporate branding journey.



**Lin Khoo** - 2nd

Entrepreneur | Financial Consultant | 10 years of helping clients  
November 27, 2023, Lin was Dr. Jerome's client

Dr Jerome Joseph is a great branding expert. I was initially skeptical upon starting his course, but he answered all my doubts with care and convinced me on the importance of branding. His course was well thought out and provides a structured guideline on how to improve your personal branding. I really appreciate the value that Dr Jerome provides.



**Harry Teo** - 2nd

Associate Financial Services Manager at Income Insurance Ltd | TOT, COT, MDRT | President of Income Summit Club  
March 18, 2022, Harry worked with Dr. Jerome but they were at different companies

I recently attended his webinar on branding and I have to say it is indeed fruitful and fulfilling. Dr Jerome is a good speaker and his content on branding and social selling was very practical and useful! I am glad he is sharing his expertise in social selling, by using different social media platforms, as this would help many individuals in their profession.



**Julie Lenggu** - 2nd

Wealth with Heart 32 Years of Expertise. Helping You Align Money with Meaning  
June 3, 2025, Julie was Dr. Jerome's client

I had the pleasure of learning from Jerome during his AI training, and his expertise and passion left a lasting impact. His ability to simplify complex concepts and make them actionable is exceptional. Jerome's approach is engaging, clear, and empowering, allowing me to immediately apply what I learned. His patience and dedication created a supportive environment where no question felt too small. Thanks to his guidance, I feel confident in leveraging AI in my work. I highly recommend Jerome to anyone seeking to deepen their AI knowledge and unlock new opportunities for growth.



**Travis Tan** - 2nd

Financial Wealth Architect | Shadow Work Strategist, Protecting Dreams, Empowering Futures. Helping professionals design lives of financial peace, & mental wellness. Wealth | Wellness | Wellbeing (1441/20Nov23)  
August 14, 2024, Travis was Dr. Jerome's client

Attending Dr. Jerome Joseph's branding workshop was a game-changer for me. I thought I had a solid grasp on personal branding.

However, Dr. Joseph's 27 years of experience in branding with financial industry across 37 countries provided me insights and strategies that took my understanding to an entirely new level. His approach to branding is both practical and transformative, offering tools that I can immediately apply to strengthen my professional presence.

I highly recommend his services to anyone looking to elevate their brand and make a lasting impact in their field!



**Carie Ong** - 2nd

From ICU to ROI | CFO on Call Helping You Retire with Confidence, Clarity, Dignity & Peace of Mind | Financial Confidence Coach | Certified Estate Planner | Ex Critical Care Senior Staff Nurse. Scholarship Recipient  
July 10, 2024, Carie was Dr. Jerome's client

I highly recommend Dr. Jerome for any speaking engagements related to branding. Dr. Jerome possess a deep understanding of branding principles and has a remarkable ability to communicate complex concepts in an engaging and accessible manner. Dr. Jerome is not only knowledgeable but also a captivating speaker who can hold an audience's attention from start to finish.

In Dr. Jerome presentations, Dr. Jerome combines theoretical insights with practical examples, making the content both informative and actionable. Dr. Jerome's dynamic speaking style, coupled with his expertise, ensures that attendees leave with a clear understanding of how to enhance their brand and apply the strategies discussed.



**Freddy L.** - 2nd

Rep No. LL300514734 | Senior Financial Services Consultant at Credence, under Great Eastern Financial Advisers Private Limited | Specializing in Retirement & Legacy Planning go.greatasterlife.com/disclaimer  
June 26, 2024, Freddy worked with Dr. Jerome on the same team

Dr. Jerome Joseph was outstanding performance during the Branding Course he conducted Throughout the duration of the course, Dr. Joseph consistently demonstrated a profound understanding of branding principles and their practical applications. His insightful contributions enriched class discussions and provided valuable perspectives to his peers.

Dr. Joseph exhibited professionalism and dedication to learning, evident in his thorough research and meticulous approach to assignments. His ability to integrate theoretical knowledge with real-world examples was particularly impressive, fostering a dynamic learning environment for all participants.

I have no hesitation in recommending Dr. Jerome Joseph for any future endeavors related to branding or marketing. His passion for the subject, coupled with his strong analytical skills and collaborative spirit, makes him an asset to any academic or professional setting.



**Genevieve Ong** - 2nd

Financial planning for the long game | Building strength, preserving choice, and protecting dignity over time | #planningforGENERations  
June 24, 2024, Genevieve was Dr. Jerome's client

I am delighted to recommend Dr. Jerome, a remarkable personal branding trainer whose expertise and dedication have significantly impacted my branding. His comprehensive personal branding program is a testament to his profound knowledge in the branding space.

Dr. Jerome possesses an exceptional ability to break down complex branding concepts, making them accessible and actionable. His personalized approach ensures that each participant's unique strengths and goals are highlighted, allowing for the creation of a powerful, authentic personal brand. Throughout his program, he emphasizes the importance of consistency, clarity, and authenticity, which are crucial for standing out in today's competitive landscape.

What sets Dr. Jerome apart is his deep understanding of the branding industry and his ability to stay ahead of trends. He provides insightful, up-to-date advice and practical tools that are immediately applicable. His engaging teaching style and genuine passion for helping others succeed make him an inspiring mentor.

Thanks to Dr. Jerome's guidance, I am able to refine my personal brand, effectively communicate my value proposition, and achieve greater professional visibility. I wholeheartedly recommend Dr. Jerome to anyone looking to elevate their personal brand and make a lasting impact in their field.



**Linda Ann Woo** - 2nd

Wealth Manager | Planning with Heart, Preserving Legacies | 30 Years of Financial Stewardship Rooted in Faith & Family  
June 3, 2025, Linda Ann was Dr. Jerome's client

The 2 day course was engaging and eye opening for me. Thank you so much for leading me from the Bronze Age into the age of AI

# Dr. JEROME JOSEPH | SPEAKER STRATEGIST AUTHOR

Brand Strategy  
Internal Branding  
Branded Customer Experience  
Sales & Marketing  
Leadership  
Culture  
Artificial Intelligence

Connect with Global Brand Academy:



Contact Dr Jerome Joseph:



Dr. Jerome Joseph, CSP



Dr. Jerome Joseph



Dr. Jerome Joseph



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