

# 2027 Leaders' Convention

Loews Ventana Canyon | Tucson, AZ | October 2027

## Qualification Requirements

AMG's Leaders' Convention takes place every 18 months, serving as a reward and recognition trip to celebrate the accomplishments of our top producers. In 2027 the Convention will be held at Loews Ventana Canyon in Tucson, Arizona—a return to a familiar and beloved location that also hosted our 2017 Leaders' Convention. This resort offers a blend of luxury, relaxation and adventure in a breathtaking desert setting, making it the ideal choice for our time together.

You've made a profound impact in your community by bettering the lives of the clients you serve, and our Leaders' Convention is a perfect time to reflect, reenergize, and reward you for this hard work.

To qualify for the 2027 Leaders' Convention, points will be awarded as follows based on production with AMG from January 1, 2026, through June 30, 2027.

Category	Points Calculation
Life, LTC, and Disability Insurance	Points = First Year Target Premium
Annuities and Single-Premium Products	Points = First Year Paid Commission*
Cetera Wealth GDC	Points are based on Production and Payout. Contact our finance team for specifics.

Based on these points, invitations will be extended to four groups of qualifiers:

Qualification Categories	Points Required**	Award Includes
Leaders' Cabinet (90,000 from life premium)	200,000	<ul style="list-style-type: none"> <li>Invitation to Leaders' Convention + Guest</li> <li>Paid travel to Convention for Qualifier and Guest</li> <li>Two extra nights at Loews Ventana Canyon</li> </ul>
Leaders' Council (75,000 from life premium)	175,000	<ul style="list-style-type: none"> <li>Invitation to Leaders' Convention + Guest</li> <li>Paid travel to Convention for Qualifier and Guest</li> <li>One extra night at Loews Ventana Canyon</li> </ul>
Leaders' Circle (60,000 from life premium)	150,000	<ul style="list-style-type: none"> <li>Invitation to Leaders' Convention + Guest</li> <li>Paid travel to Convention for Qualifier and Guest</li> <li>Paid Amenities such as Golf + Spa</li> </ul>
Leaders' Club (60,000 from life premium)	108,000	<ul style="list-style-type: none"> <li>Invitation to Leaders' Convention + Guest</li> <li>Qualifier and Guest must arrange transportation to and from Convention</li> </ul>

*AMG Insurance & Financial Company ("AMG") reserves the right to change the points criteria during the course of the qualification period if changes to industry rules or regulations impact this event. All qualifiers must be in good standing with AMG at time of Leaders' Convention. Invitations are not transferrable and will be honored only during the duration of convention registration; invitations not accepted, and registration not completed within the registration window will be void. \*\*A minimum of 60,000 points must come from life premium (90,000 for Cabinet level). In accordance with the IRS Code 26, Section 74, the fair market value of the trip, for both the qualifier and guest, will be reported as income through Form 1099-MISC, which will be provided to the qualifier by January 31, 2028. \*MYGA's will be reviewed and adjusted for points.*