

MDRT Day

in Thessaloniki, Greece

26th-27th
September 2025

Porto Palace hotel,
Thessaloniki



Richard Dobson, CFP is a career financial services professional; he is on a mission to de-complicate client communications in financial services. Mr. Dobson is a frequent industry volunteer and main platform speaker. He is the author of the 2022 book “Make Simplicity Your Superpower” “Communication Hacks Every Financial Advisor Should Know” from Sound Wisdom.

NAIFA (National Association of Insurance and Financial Advisors) Member X40
MDRT (Million Dollar Round Table) Life and Qualifying Member X22
Certified Financial Planner™ Professional
MDRT Annual Meeting Vancouver 2024 Focus Session
MDRT Annual Meeting Main Platform Speaker X3
MDRT Global Conference Singapore, Main Platform Speaker 2023
FINRA Series 6, 26, 27, 51, 63, 65 qualified
NAIFA-Iowa Board of Trustees Officer- Treasurer (2014)
MDRT Foundation President (2017)
MDRT Finance Committee Chair DVP (2016)
Former FINRA Broker/Dealer Chief Compliance Officer
NAIFA National Investment Committee Member (2015)
MDRT Foundation Inner Circle Society Member
Great American Life Ins. Co-Presidents Advisory Council 2003-2009
NTSAA (National Tax-Sheltered Annuity Association) Elite Advisor Award (2014)
SEC Nationally Registered Investment Advisory Firm, frm President and Officer
Multi-state Insurance Continuing Education Provider (1984-present)
MDRT Annual Meeting Main Platform + Special Sessions Committee Chair (2022)
Author -” The Trusted Professional” 2023 book from Sound Wisdom
MDRT Foundation Excalibur Knight

And this too!

Member- General Society of Mayflower Descendants

Member- United Empire Loyalists’ Association of Canada



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