

# YOUR ROAD TO THE 2027 MASTERS

## Financial Professional Qualification Overview

### What This Means for You as a Financial Professional

This sales competition rewards top performance with an opportunity to attend the **2027 Masters Tournament**, one of the most prestigious golf events in the world.

Each **qualifying Strategic Alliance** earns:

- **2 financial professional attendee spots**
- **1 corporate representative attendee spot**

Your production directly impacts whether your Strategic Alliance qualifies, and whether you secure one of the two financial professional spots.



### Step 1

#### M Financial Qualification Requirements (At a Glance)

Your first step toward the Masters is M Financial **placing in the Top 3** out of the four Penn Mutual Strategic Alliances during the qualification period.

- The **top three producing Strategic Alliances qualify** (M Financial, Lion Street, NFP, and FFR)

*See official program rules for full Strategic Alliance qualification criteria.*

### Step 2

#### Financial Professional Qualification

If M Financial qualifies, financial professionals qualify as follows:

- Be a M Financial **Principal or contracted financial professional** with Penn Mutual
- Rank as **one of the Top 2 financial professionals** within M Financial
- Ranking is based on **Total Penn Mutual Life Weighted Premium** during the qualification period
- Attendance is for the **tournament dates selected by M Financial**



**Qualification is based on total life insurance production from January 1, 2026–December 31, 2026.**

**Questions?** Please contact **Pam Ziegler** at (602) 363-0136 or [ziegler.pam@pennmutual.com](mailto:ziegler.pam@pennmutual.com)

*Please note travel to and from the tournament is at your own expense; All other tournament and accommodation costs will be covered by Penn Mutual. The contest rules are non-transferable.*

*This sales competition is based on total life insurance production across all eligible fixed and securities products, equally weighted among all participating Penn Mutual Strategic Alliance members. No award or incentive is conditioned on the sale of any specific product or product type. Program administered in accordance with applicable FINRA non-cash compensation and sales contest rules.*

For financial professional use only.

This sales contest is invitation only and offered at the discretion of The Penn Mutual Life Insurance Company. The Penn Mutual Life Insurance Company reserves the right to change eligibility requirements, performance criteria, awards, timing, or to cancel the contest entirely, at any time and for any reason.

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