



2026

Berthel Fisher Companies

PRESIDENT'S CLUB
CONFERENCE



April 22-27, 2026 | Hollywood Beach, FL

MARGARTAVILLE[®]
Beach Resort

HOLLYWOOD BEACH, FL



BERTHEL FISHER
COMPANIES

\$400,000 Minimum
GDC to Qualify



2026 President's Club

Qualification

<u>Levels</u>	<u>Minimum GDC</u>	<u>Incentives earned</u>
Level 1	\$400,000 GDC	Financial Professional's airline ticket and 4 hotel nights
Level 1+	\$550,000 GDC	Financial Professional's airline ticket, guest airline ticket (1099 issued), and 4 hotel nights
Chairman	\$700,000 GDC	Financial Professional's airline ticket, guest airline ticket (1099 issued), 5 hotel nights, and invitation to Chairman's dinner

Guidelines

1. Financial substitutions are not allowed.
2. Financial Professional must be registered and in good standing with the Berthel Fisher Companies affiliated broker/dealer or RIA at the time of the trip in order to attend.
3. Financial Professional may be responsible for cancellation fees if for some reason, trip is booked and then cancelled less than 30 days prior to departure.
4. Substitution may be allowed in certain circumstances. If substitution is permitted, designee must be a Registered Representative, Investment Advisor or Registered Sales Assistant with a Berthel Fisher Companies affiliated broker/dealer or RIA and must have regular client interaction. Designee must be part of the original qualifier's office. Designee will attend at Level 1 regardless of the level reached by the original qualifier.
5. Financial Professionals with split/joint rep numbers that achieve the qualification level under that number may designate one Representative/Advisor from the split arrangement to attend for each \$400,000 of GDC achieved. Ex: if \$800,000 in GDC is generated under the split rep number, two Financial Professionals from the split arrangement could attend at Level 1.

6. Additional Incentive:

Financial Professionals have the ability to earn upgraded flights or additional representation at the President's Club Conference based on the criteria below:

For each \$1.5 million in GDC, Financial Professional may choose one of the options below:

- A) First Class flight upgrades to/from Presidents Club for Financial Professional and 1 guest

OR

- B) Invite an additional attendee from Financial Professional's office
- Additional attendee(s) must be a Registered Representative, Investment Advisor or Registered Sales Assistant with a Berthel Fisher Companies affiliated broker/dealer or RIA and must have regular client interaction.
 - Additional Attendee(s) will attend the conference at Level 1.