



2025 Recognition Trips

Qualifications & details for the 2024 calendar/1099 year

Top producer tier	Location	Dates	Number of qualifiers ¹	Minimum qualifications for individual practices and individuals within teams ^{1, 2}	Minimum qualifications for Enterprise Leaders (OSJs) and IMOs	Recognition trip benefits ³	ConnectED benefits ³
Oasis	Tuscany, Italy Castelfalfi	April 24-28, 2025	Top 75	A minimum \$2 million in GDC and at least 50% of assets on WMP	A minimum \$10 million in GDC and at least 30% of assets on WMP	Coach class airfare for qualifier and one guest Four-night stay at conference hotel Ground transfers to and from destination airport	Coach class airfare for qualifier and one staff member Three-night stay at conference hotel for qualifier and one staff member (one room each) Guest pass for both the qualifier and staff member for the final night event
Ovation	Ojai, California Ojai Valley Inn	May 5-9, 2025	Next 250	A minimum of \$1.2 million in GDC and at least 40% of assets on WMP; or a minimum of \$1.2 million in GDC and at least 65% of all assets on platform ⁴ ; or \$3.5 million in GDC alone	A minimum of \$5 million in GDC and at least 20% of assets on WMP; or a minimum of \$5 million in GDC and at least 45% of all assets on platform ⁴ ; or \$10 million in GDC alone	Coach class airfare for qualifier and one guest Four-night stay at conference hotel Ground transfers to and from destination airport	Coach class airfare for qualifier Three-night stay at conference hotel Guest pass for final night event
Odyssey (wave 1)	Marco Island, Florida JW Marriott Marco Island Beach Resort	June 1-4, 2025	Next 500	A minimum of \$1 million in GDC	A minimum of \$5 million in GDC	Coach class airfare for qualifier and one guest Three-night stay at conference hotel	Three-night stay at conference hotel
Odyssey (wave 2)	Marco Island, Florida JW Marriott Marco Island Beach Resort	June 4-7, 2025	Next 500	A minimum of \$750,000 in GDC	A minimum of \$3 million in GDC	Ground transfers to and from destination airport	Guest pass for final night event

¹To qualify for a top producer tier, you must meet minimum qualifications and be within the top number of qualifiers across all firms. ²Additional information on qualification requirements for Teams will be shared soon. ³Benefits are “use it or lose it” and are not transferable for financial professionals. OSJs and large enterprise leaders may be able to transfer benefits to others who hold an equivalent leadership position in their firm. ⁴Assets on platform are defined as assets on Pershing or NFS. Examples include the Wealth Management Platform (WMP), DirectChoice, and brokerage account assets.