

## NEW AGENT CHECKLIST

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### STEP 1 – CONTRACTING (Must have insurance license) (Skip to Step 2 if you do not have your insurance license)

- RegED AML Certificate
- E&O Insurance
- Contracting Profile, Surancebay Emails, Lead Access (3 tasks listed in Step 1 on training site)
- Print [Carrier Contracting Check List](#) on Theodore website
- \*Text photo of completed [Carrier Contracting Check List](#) to your manager

### STEP 2- GOAL SETTING & SCHEDULE

- Add Weekly Conference Call Schedule on your calendar
- Attend an Equis Training Camp (ETC) near you
- Register for National Convention
- Learn how to Earn Free Leads
- Set Income Goals
- Set Schedule
- Join the Theodore Group Email List and Sales Leaderboard Page

### STEP 3- GET YOUR BAG READY

- Print the [Application Check List](#) and then print the applications for each product (STEP 1 must be completed first)
- \*Text photo of completed [Application Check List](#) to your manager
- Print [Underwriting Grids](#), [Product Tables](#), and [In-Home Tools](#)
- Print the [NEEDS ANALYSIS](#) Worksheet
- Join in-home risk assessment GroupMe page (if applicable)
- Set-Up Nassau (Phoenix) e-apps

### STEP 4- TECHNOLOGY

- Create shortcuts on phone and tablet for carrier quoting tools
- Download CFG quoting apps for Term and Final Expense

### STEP 5- ACCESS LEAD SYSTEMS & BUY LEADS

- Request access to OPT (must be contracted, refer to STEP 1 if not already completed)
- Do NOT pay for OPT upgrade-choose option that says not interested
- Set-Up MailCo account
- Review your first lead order with your Manager

### STEP 6- PHONE SCRIPTS

- Print phone scripts
- D Lead & Final Notice Mailing training
- Watch Bill Martin's Live Dials training – Equis Training Site

### STEP 7- IN-HOME PRESENTATION

- View In-Home Presentation videos
- Attend Bill Martin's Jumpstart training webinar – Every Wednesday 11am EST