NEW AGENT CHECKLIST

STEP 1 – CONTRACTING (Must have insurance license)

- ☐ RegED AML Certificate
- ☐ E&O Insurance
- ☐ Contracting Profile, Surancebay Emails, Guided Start-Up, Lead Access (4 Tasks List 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 Financial Business Overview Meeting (EBO) near you
- ☐ Register for National Convention
- ☐ Learn how to Earn Free Leads
- ☐ Set Income Goals
- ☐ Set Schedule
- ☐ Join the Theodore Group Email List and Group GroupMe Page

STEP 3- GET YOUR BAG READY

- ☐ Print the Application Check List and then print the carrier applications for each product (Step 1 must be completed)
- ☐ *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- SET UP LEADS ACCESS

- ☐ Review your first lead order with your Manager (Step 1 must be completed)
- ☐ Set-Up MailCo account

STEP 6- PHONE SCRIPTS

- ☐ Print phone scripts
- ☐ D Lead & Final Notice Mailing training
- ☐ Attend Bill Martin Live Dials training webinar – Every Friday 3pm EST

STEP 7- IN-HOME PRESENTATION

- ☐ View In-Home Presentation videos
- ☐ Attend Bill Martin's in-home presentation training webinar – Every Wednesday 3pm EST

Last Updated: 03/31/2019