NEW AGENT CHECKLIST

**STEP 1 – CONTRACTING (Must have insurance license)**

◻ RegED AML Certificate

◻ E&O Insurance

◻ Color copy of your driver’s license or photo id

◻ Banking Information (voided check or letter from bank with account information on it)

◻ Contracting Profile, Surancebay Emails, Guided Start-Up, Lead Access (4 Tasks List in Step 1 on training site)

**STEP 2- GOAL SETTING & SCHEDULE**

◻ Add Weekly Conference Call Schedule on your calendar

◻ Register for National Convention

◻ Learn how to Earn Free Leads

◻ Set Income Goals

◻ Set Schedule

◻ Text your upline to add you the Team Band and Groupme sites

**STEP 3- GET READY TO WRITE**

◻ Print the carrier applications for each product (Step 1 must be completed)

◻ Print Underwriting Guidelines

◻ Once you received a writing number, call each carrier and order printed material

**STEP 4- TECHNOLOGY**

◻ Create shortcuts on phone and tablet for carrier quoting tools

◻ Download CFG quoting apps for Term and Final Expense (Text upline for passwords)

**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

Last Updated: 07/11/2019