



LIFE INSURANCE FEE'S IN ORDER

FEES

AGENCY CODE(Registration)	\$125 (One Time Fee)
52hr Pre-Licensing Course	\$36 (One Time Fee)
State Exam	\$55-98 (Varies By State)
Live Scan (Fingerprints)	\$69 +/- (One Time Fee)
State License Application/Renewal	\$188 +/- (Varies By State)
WFG Background Check	\$40 (One Time Fee)
Continuing Education	\$55 +/- (Every 2 Years)
WFG Platform Fee	\$15 (Monthly)
E&O Insurance	\$130 (Quarterly)
WFG Provider Affiliation Fee	\$81 (Out of First Commission)

Recurring Fees:

- \$15 Platform Fee (Monthly)- Reimbursed if an average 2,000 monthly points are met
- \$130 E&O Insurance (Quarterly)
- \$193 License Renewal (Every Two Years)
- \$55 Continuing Education

** Reserves Program 10% Until \$1,000

** Roll-Up Re-Payment 10% Until Paid (If Applicable)

**These fees apply to the state of California. Fees may vary according to the state.



NEW ASSOCIATE TRACKER

- SCHEDULE STUDY COURSE & TEST
- GET ADDED ON TEAM ATHENA SLACK
- SET UP FREE ZOOM ACCOUNT
- SET UP PROFESSIONAL EMAIL
- COMPLETE PERSONAL FINANCIAL REVIEW
- REGISTER FOR TEAMATHENA.NET and CONQUER.FINANCIAL
- HEADSHOT
- PASS STATE EXAM
- COMPLETE 6 WFG INTRO CLASSES:
 - ORIENTATION
 - COMPENSATION
 - SCRIPTS
 - LIST BUILDING
 - WFG PRODUCT OVERVIEW
 - FIELD TRAINING
- COMPLETE LICENSING
- SCHEDULE GRAND OPENING/ TOP 25
- COMPLETE 1.1.7
- SCHEDULE 3 CLIENT PRESENTATIONS
- GET PROMOTED TO ASSOCIATE (3.3.30)
- PLAN RUN FOR SA OR MD PROMOTION
 - BUSINESS PLAN



INTRO CLASSES

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- ❑ Orientation Class
 - ❑ Compensation and Promotions
 - ❑ Scripts Class
 - ❑ List Building
 - ❑ WFG Product Overview
 - ❑ Reasons Why Field Training Is Important

Videos can be found on
website: conquer.financial
Tab: Training -> Intro to WFG
Classes

please register on website



GOALS

FIRST 30 DAYS

- 1.1.7 (1 BUSINESS PARTNER,
1 APPLICATION CLOSED, IN 7 DAYS)
- BECOME LICENSED
- COMPLETE 10 PRACTICE APPOINTMENTS
- INVITE 10 GUEST TO CORPORATE
OVERVIEW
- ASSOCIATE PROMOTION (3.3.30)



ONCE LICENSED

- CREATE WFG PASSWORD AT WWW.MYWFG.COM
- COMPLETE CONTINUING EDUCATION
 - AFFORDABLEEDUCATORS.COM
 - AML, LTC, 8 HR ANNUITY
- ENROLL IN E&O INSURANCE (MUST BE DONE WITHIN FIRST 30 DAYS OF POSTING LICENSE TO WFG OR TERMINATED)
- ENROLL IN PLATFORM FEE AUTOMATIC PAY (\$15)
- ENROLL IN DIRECT DEPOSIT
- SUBMIT PROVIDER APPOINTMENTS
- BECOME A FIELD TRAINER AND GET SIGNED OFF
 - CLIENT PRESENTATIONS
 - HIRING INTERVIEW
 - RUNNING ILLUSTRATIONS
 - SCENARIOS RECOMMENDATIONS



WEEKLY SCHEDULE

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
<p>MINDSET MONDAY 10AM PST / 1PM EST</p> <p>ZOOM MEETING ID: 852 5356 1081</p> <p>PASSCODE: ATHENAI **ALL CAPS**</p>	<p>GENERAL TRAINING 6:30PM PST/ 9:30PM EST</p> <p>ZOOM MEETING ID: 831-2420-7754</p> <p>PASSCODE: GLENDORACT **ALL CAPS**</p> <p>TRAINING AVAILABLE VIA ZOOM & IN PERSON AT THE GLENDOORA OFFICE</p>			<p>ATHENA TEAM TRAINING 11AM PST/ 2PM EST</p> <p>MEETING ID: 875 3878 0342</p> <p>PASSCODE: TEAMATHENA **ALL CAPS**</p>	<p>GENERAL TRAINING 10:00AM PST/ 1:00PM EST</p> <p>ZOOM MEETING ID: 825- 1537-0901</p> <p>PASSCODE: GLENDORACT **ALL CAPS*</p>

PLEASE ADD THESE DAYS AND TIMES TO YOUR CALENDAR.

WE ASK YOU HAVE YOUR CAMERAS ON AND BE READY TO PARTICIPATE.

PLEASE ADD ATHENA BEFORE YOUR NAME ON ZOOM FOR THESE CALLS EX. ATHENA- ANNETTE URIBE