



# NEW ASSOCIATE TRACKER

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

# TEAM ATHENA SLACK





# LIFE INSURANCE FEE'S IN ORDER

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## FEES

AGENCY CODE (Registration)	\$125 (One Time Fee)
52 hr 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	\$71 (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.



# INTRO CLASSES

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

Videos can be found on website: [conquer.financial](http://conquer.financial)  
Tab: Training -> Intro to WFG Classes

**\*\*Please register on website\*\***



# GOALS

## FIRST 30 DAYS

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- 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

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- ❑ 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



# TEAM ATHENA TRAINING SCHEDULE

## Monday

### ACCOUNTABILITY & PHONE ZONE

10am pst

FULLERTON OFFICE & ZOOM

Meeting ID:

**892 0475 8243**

PASSCODE:

**ATHENA#1**

**\*\*ALL CAPS\*\***

Start your week strong! Our Monday calls are designed to set the tone for a productive and focused week. We'll begin by reviewing the previous week's numbers, highlighting wins, and identifying opportunities for improvement. Then, each team member will share what they're holding themselves accountable for in the week ahead.

Immediately following the meeting, we'll move into Phone Zone — a dedicated session to make calls, set appointments, and generate activity to fuel your pipeline.

Please come prepared with: Your completed accountability sheet & Names and numbers to contact during Phone Zone

Let's hit the ground running and make the most of the week ahead!

## Tuesday

### GENERAL TRAINING

6:30pm pst

FULLERTON OFFICE & ZOOM

Meeting ID:

**884 5897 4647**

PASSCODE:

**ATHENA#1**

**\*\*ALL CAPS\*\***

Our Tuesday Trainings are focused on equipping you with the knowledge and tools needed to confidently support your clients and business partners. Each session introduces new material or reinforces key topics, helping you sharpen your skills through repetition and real-world application. Whether it's your first time hearing it or your fifth, every training is an opportunity to practice, grow, and perfect your approach.

## Friday

### AGENT TRAINING COURSES

12pm pst

FULLERTON OFFICE & ZOOM

Meeting ID:

**834 3362 0379**

PASSCODE:

**ATHENA#1**

**\*\*ALL CAPS\*\***

Our Friday training sessions are essential for new agents working toward certification and field readiness. These trainings are designed to prepare you with the knowledge and confidence needed to support clients independently and begin training new business partners.

Each session focuses on building a strong understanding of our products, services, and business opportunity. This is your time to lay the groundwork for a successful career — take it seriously, show up prepared, and stay engaged.

What to expect:

\*Step-by-step guidance toward certification

\*In-depth product and service training

\*Real-world scenarios and best practices

\*Tools to help you lead and grow your team

Let's build the knowledge and confidence you need to thrive in the field!

## Saturday

### STRATEGIC SATURDAY

9:00am pst

Register at:

**[www.strategicsaturday.com](http://www.strategicsaturday.com)**

*\*\*To keep this webinar secure, do not share this link publicly.\*\**

Notes:

#### **What to bring:**

- A focused mindset
- Willingness to participate
- Something to take notes with
- Questions you'd like answered

**Be present, be engaged, and use this time to grow!**

**\*\*PLEASE HAVE CAMERAS ON ZOOM\*\***

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