

NEW AGENT GETTING STARTED CHECKLIST

❖ **CONGRATULATIONS!!** You've finished **STEP 1** (Registering with Equis) and **STEP 2** (Getting Licensed). The remaining steps are designed to empower you to have a fast start in the life insurance industry. Log on to the thecardinal.life website to complete the following steps. As you finish each of the steps in this checklist text an update to your manager. **Please contact your manager if you have any questions.**

STEP 3- COMPLETE YOUR AML (ANTI-MONEY LAUNDRING) TRAINING

- RegED AML Certificate obtained.

STEP 4- PURCHASE YOUR E&O INSURANCE

- E&O Insurance Policy obtained.

STEP 5- INSURANCE CARRIER CONTRACTING

- ❖ **IMPORTANT** - Click [HERE](#) to download the fillable Carrier Contracting Packet to your computer. Once the packet is completely filled out, send it to processing@equisfinancial.com
 - Collect all the documents needed to complete your contracting packet: Copy of Insurance and Drivers licenses, a voided check, AML certificate, E&O Insurance Certificate.
 - Complete your Contracting Packet
 - Confirm Surancebay emails for each carrier (remember to check spam folder)
 - Complete GPM Contracting – Make sure to respond to email that GPM sends you.

STEP 6- SET UP LEAD ACCESS

- Email leads@equisfinancial.com to request access to OPT
- Confirm that you have received the “Verified” email from Equis so you can purchase leads.
- Sign up for a MailCo account at mailcoproductions.com. Agency=Equis, Group=Oliver Collins
- Email Cheryl from LeadCo and request inventory lists for your area Cheryl@leadcoleads.com

STEP 7- NEW AGENT TRAINING

➤ GOAL SETTING & SCHEDULE

- Discuss goals with your manager
- Establish work schedule and lead strategy

➤ ASSOCIATION & TRAINING

- Join various Group Me's to stay connected
- Plug into training calls and attend a live training event (LTC or ETC) near you.
- Text the word EQUIS (all caps) to 797979 to be added to the Equis text blasts.

➤ **SET-UP YOUR SMART PHONE**

- Create shortcuts on phone and tablet for carrier quoting tools
- Download CFG quoting apps for Term and Final Expense
- Print the Carrier One Pager and fill it out.
- Enter the carrier contact info into your phone.

➤ **GET YOUR BAG READY**

- ❖ If you plan on taking an iPad or Lap Top into the field I
 - Print the Application Check List and then print the applications for each product
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 - Print Underwriting Grids, Product Tables, and In-Home Tools
 - Print many copies of the FIELD UNDERWRITING WORKSHEET

➤ **PHONE SCRIPTS**

- Print phone scripts and Activity Tracker pages.
- Watch Bill Martin's Live Dials training – Equis Training Site
- Roll Play phone call with manager.

➤ **IN-HOME PRESENTATION**

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

START CALLING LEADS AND BOOKING APPOINTMENTS- YOU'RE READY!!!