



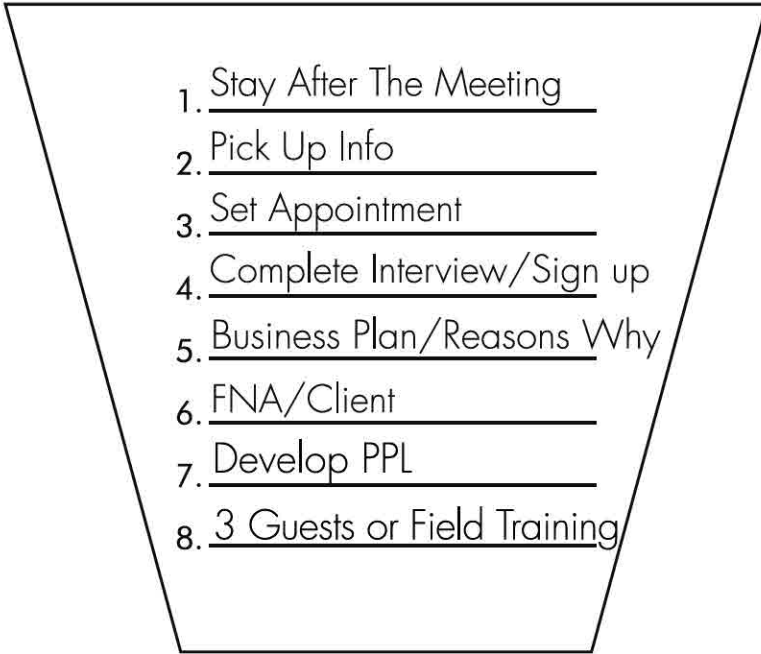
New Agent Start-Up Kit

Agent Name:	Cell:
Start Date:	Fast Start School:
SMD Name:	Cell:
Trainer Name:	Cell:
Fast Start Qualifications: PPL____ 3BPM/BMP____ FNA____ SMD Signature_____	

Revolutionizing an Industry

Start Up

8 SPEED FILTERS



TOP GOALS/REASONS WHY

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Scenario Of Disaster

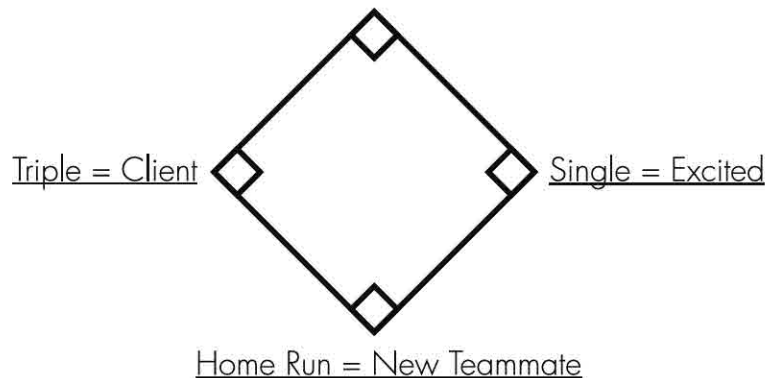
1. Your **Enthusiasm**
2. Creates **Curiosity**
3. They **Ask Questions**
4. You Attempt to **Answer Questions**
5. You **Answer Wrong!!!**
6. They **Jump to Conclusions**
7. The Result is **Failure!!!**

Business Ownership Mentality

- Trust/Credibility
- Restaurant Example
- Baseball Example

Get out of the way of your own warm market

Double = Referrals



Prospect List: Memory Jogger

Use this list to help you remember people and write their names down as they come to you.

Across the street	Garage Mechanic	Pilot/airline employee	Army
Adventurist	Goal oriented people	Play cards with	Coast Guard
Always having parties	Goes bowling with me	Plays an instrument	Marines
Ambitious	Golf Pro	Positive thinking people	Navy Buddy
Apartment Manager	Good with computers	Postman	R.O.T.C.
Art Instructor	Grocery store employee	Preacher	Veterans
Attractive	Handsome	Printer	Medical:
Bald Headed	Has a dangerous job	Public speaking skills	Chiropractor
Bank Tellers	Has a pick-up truck	Quit smoking	Dentist
Barber	Has a second job	Real Estate Agent	Dietician
Baseball team	Has expensive taste	Recent promotion	Family Doctor
Basketball team	Has hunting license	Repaired my electronics	Nurse
Best dressed	High Achievers	Restaurant owner	Orthodontist
Best personality	High School/Reunion	Ride the bus	Pediatrician
Best salesman	High self esteem	Runs a beauty shop	Surgeon
Best smile	High voice	Salesperson	Clubs:
Boss	Hobbies	School principal	Book club
Bought car from you	Home address book	Seamstress	Golf Club or group
Brunette/Blond/Redhead	In another city	Secretary	Lion's club
Bus driver	In management	Self motivated people	Optimist club
Car repair	Interior decorator	Sells flowers	Rotary club
Carpenter	Just married/had a baby	Senior citizen	Toastmasters
Cell phone contacts	Lab technician	Sheriff	YMCA
Choir	Landlord	Shortest	YWCA
Christmas card list	Law Enforcement	Single Dad/Mom	Family:
Church friends/Directory	Librarian	Soccer/Sports Parents	Brother/Sister
Coaches	Lifeguard	Sold you a car (private)	Son/Daughter
College friends/Coaches	Likes cars	Spa or health club	Cousins
Computer programmer	Likes to camp	Speech class	Uncles/Aunts
Confident people	Likes to debate	Step children	Grandparents
Contractor	Likes to play golf	Student	Parents
Co-worker	Little League	Successful people	In-laws
Dance class/teacher	Mailman	Tallest	Other Relatives
Day care center	Minister	Taxi driver	Wedding:
Deep voice	Most integrity	Teachable people	Attended
Delivers Parcels & Packages	Most likely to succeed	Teachers	Best Man/Maid of Honor
Does odd jobs	Most outgoing	Teaches my kids	Bridesmaids/Groomsman
Downsized/laid off/fired	Most popular	Team concept people	Photographer
Drives Cadillac	Most trustworthy	Tells jokes	Networking Groups:
Drives Chevy/Ford/Dodge	Motel owner	Thrifty	Alumni association
Drives European	Moustache	Track team	Facebook
Drives Japanese	Music Lessons/Teacher	Twins	Linked In
Drycleaner	Natural leaders	Unemployed	My Space
Eat out with	Needs more money	Vacationed with	Other networking groups
Editor	Neighbors on the left	Waitress	People Who:
Electrician	Neighbors on the right	Was in my car pool	Are on a diet
Enthusiastic	New car	Was my teacher	Are Underinsured
Entrepreneurial	Notary Public	Wears a beard	Are Uninsured
Eye Glasses	Office manager	Web designer	Have organization skills
Fashion Model	Office skills	Where you grew up	Like a challenge
Finger nail technician	Optimistic	Who do you call for help	Like helping charities
Fire Chief	Other neighbors	Work out with	Love people
Fireman	Out of state	Workaholic	Love to learn new things
Former boss/co-workers	Owens a restaurant	Works for the city/state	Own small businesses
Former Church	P.T.A.	Works nights/shifts	Want more for their family
Former Neighbors	Painted my house	Works weekends	Want out of debt
Former roommate	Parent's friends/neighbors	Military:	Want to retire
Furniture salesman	Pay too much in taxes	Air Force	Want to work for themselves

For Internal Use Only.

START-UP WORKSHEET

Associate Name: _____ Senior Marketing Director: _____

Name	Profile*
	1 2 3 4 5 6 7 8

Date Completed: _____ SMD Approval: _____

Name	Profile	Name	Profile
1.	12345678	26.	12345678
2.	12345678	27.	12345678
3.	12345678	28.	12345678
4.	12345678	29.	12345678
5.	12345678	30.	12345678
6.	12345678	31.	12345678
7.	12345678	32.	12345678
8.	12345678	33.	12345678
9.	12345678	34.	12345678
10.	12345678	35.	12345678
11.	12345678	36.	12345678
12.	12345678	37.	12345678
13.	12345678	38.	12345678
14.	12345678	39.	12345678
15.	12345678	40.	12345678
16.	12345678	41.	12345678
17.	12345678	42.	12345678
18.	12345678	43.	12345678
19.	12345678	44.	12345678
20.	12345678	45.	12345678
21.	12345678	46.	12345678
22.	12345678	47.	12345678
23.	12345678	48.	12345678
24.	12345678	49.	12345678
25.	12345678	50.	12345678

Name	Profile	Name	Profile
51.	12345678	76.	12345678
52.	12345678	77.	12345678
53.	12345678	78.	12345678
54.	12345678	79.	12345678
55.	12345678	80.	12345678
56.	12345678	81.	12345678
57.	12345678	82.	12345678
58.	12345678	83.	12345678
59.	12345678	84.	12345678
60.	12345678	85.	12345678
61.	12345678	86.	12345678
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64.	12345678	89.	12345678
65.	12345678	90.	12345678
66.	12345678	91.	12345678
67.	12345678	92.	12345678
68.	12345678	93.	12345678
69.	12345678	94.	12345678
70.	12345678	95.	12345678
71.	12345678	96.	12345678
72.	12345678	97.	12345678
73.	12345678	98.	12345678
74.	12345678	99.	12345678
75.	12345678	100.	12345678

Name	Profile	Name	Profile
76.	12345678		
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97.	12345678		
98.	12345678		
99.	12345678		
100.	12345678		

Profile: * 1-25+yr 2- Married 3- Dependent Children 4- Homeowner 5- Solid Business/Career Background 6- \$40,000+ income 7- Dissatisfied w/ situation 8- Entrepreneurial

For Internal Use Only

TOP 25 START-UP

Rep Name:

Date Completed:

Approved By:

	Name & Spouse	Last Name	Phone Number(s)	Profile *	Mtg?	Comments
1				1 2 3 4 5 6 7 8		
2				1 2 3 4 5 6 7 8		
3				1 2 3 4 5 6 7 8		
4				1 2 3 4 5 6 7 8		
5				1 2 3 4 5 6 7 8		
6				1 2 3 4 5 6 7 8		
7				1 2 3 4 5 6 7 8		
8				1 2 3 4 5 6 7 8		
9				1 2 3 4 5 6 7 8		
10				1 2 3 4 5 6 7 8		
11				1 2 3 4 5 6 7 8		
12				1 2 3 4 5 6 7 8		
13				1 2 3 4 5 6 7 8		
14				1 2 3 4 5 6 7 8		
15				1 2 3 4 5 6 7 8		
16				1 2 3 4 5 6 7 8		
17				1 2 3 4 5 6 7 8		
18				1 2 3 4 5 6 7 8		
19				1 2 3 4 5 6 7 8		
20				1 2 3 4 5 6 7 8		
21				1 2 3 4 5 6 7 8		
22				1 2 3 4 5 6 7 8		
23				1 2 3 4 5 6 7 8		
24				1 2 3 4 5 6 7 8		
25				1 2 3 4 5 6 7 8		

*Profile: 1- 25+yr 2- Married 3- Dependent Children 4- Homeowner 5- Solid Business/Career Background 6-\$40,000+ income 7- Dissatisfied w/situation 8- Entrepreneurial

HELP ME SCRIPT

Hi _____ this is _____ (Small talk)

I don't know if you have heard but I recently took a position with a financial services company called Revolution Financial Management and I need your **help**. (Pause, they will usually ask how can I help).

Well I am in their training program that includes classroom training, getting my licenses, and ten on-the-job field training appointments. My goal is to get my ten training appointments done in the next week and I value your opinion and was hoping you and _____ would help me out by being one of my training appointments. You'll help me out, won't you? (Wait for answer).

Great, thanks! What is better for you _____ or _____ (i.e. Wed or Fri, daytime or evening, 6:00 or 8:00).

Let me ask you, who else do you think I should talk to that might set up a training appointment with me?

Let me write down your address. Ok Great!, I'll see you on _____ at _____

QUESTIONS:

Prospect: *WHAT IS IT?*

You: It's about 30 - 40 minutes or so, and we'll just stop by and show you all the things we do. Then maybe in the future if you know someone or you hear anybody talking about it, you can give me a referral. If nothing else I get my training out of the way.

Use ETHOR to execute a great "Help Me" script everytime.

Excited

Training

Help

Opinion

Referrals



1st 90 Day Business Plan

1st month –

- 1) Pass Life Exam
- 2) Earn Gold Badge
- 3) Field Training and Recruiting
- 4) _____
- 5) _____
- 6) _____

2nd Month –

- 1) Field Training and Recruiting
- 2) Get Appointed
- 3) 10k points – Earn Associate Promotion
- 4) Become a Field Trainer
- 5) _____
- 6) _____
- 7) _____

3rd Month –

- 1) Field Train Team
- 2) Replace Income
- 3) Minimum 10,000 Points - \$1,000 in income
- 4) _____
- 5) _____
- 6) _____

Fight for CEO Club



1) Introduction

Tell about the business, what I feel at this point. (Excited)

2) Affirmations

Positive self talk usually about the person you're becoming

3) Top 10 reasons you joined RFM (non-monetary)

Retire early, retire parents, help families, kids schooling.

4) Goals and Action Items

- Long and short term goals
- When am I going full time
- When am I going to be SMD
- When will I be fully licensed
- Have exact amount of desired monthly income
- How much monthly production

5) Personal Goals

- # of BPM invites each week
- # of new prospect clients appointments each week
- # of recruits each week and each month

6) Personal production and base production goals

7) What I need to give up to achieve these goals (Sacrifices)

Free time, family time, going out time.

8) What is it I need to improve in myself to achieve my goals.

Five strong points and five weaknesses.

9) Closing

Important Contact & Office Information

Office Meeting Schedule

Monday

9:00am - 10:30am Leadership Meeting (All team members welcome)

Tuesday Evening

7:00pm - 7:15pm Office Meet and Greet

7:15pm - 9:00pm Training and Company Overview (Guests Welcome for Overview)

Saturday Morning

9:00am – 9:30am Office Meet and Greet

9:30am – 11:00am Training and Company Overview (Guests welcome for Overview)

Agoura Hills Office Contacts

Shawn Villalovos (818)402-5831 or Jaime Villalovos (818)402-9436

Brittani Oliva – 818-879-9513 - shawnvmd@hotmail.com

Neil Sandoval – 818-879-9514 – shawnvmd@hotmail.com

Office Fax – 818-879-9521

Office Address – 28632 Roadside Drive Suite 240 Agoura Hills, CA 91301

Websites

www.financialrevolution.com

www.mywfg.com

www.insurance.ca.gov

www.tfaconnect.com

RESOURCES & MATERIALS:

Notebook (5 Star MEAD recommended)

BFS BOOK (Business Format System)

TRAINING CD'S: 1 2 3 4 5

Ticket to BIG EVENT- VERY IMPORTANT

Flipchart

RECOMMENDED READING

1. Tax Free Retirement- Patrick Kelly
2. Think & Grow Rich- Napoleon Hill
3. The Magic Of Thinking Big- David Schwartz
4. Rich Dad Poor Dad- Robert Kiyosaki
5. How To Win Friends & Influence People

Education Providers

www.52hours.com/teamrevolution (Life & Securities)

32 Hour Life Only Pre License Training

Agency

Homeoffice

General Phone – 770-453-9300 (Ask for “Agent Services”)

All Appointment Paperwork – Fax 678-966-6100

GETTING YOUR LICENSE

The first thing you need to do is get your California state insurance license. I will briefly guide you through getting your license.

STEP 1: Pre-License Education

The course that you will need to complete is the 32 hour Life Agent course. This will be completed through www.52hours.com/teamrevolution. The course includes audio and visual material. Once you are on the website:

- >**Purchase** the 32hr Life Agent for \$29.99
- >Complete the registration form
- >Enter all your billing information and submit your order.

Once you have your registration you will go to **Account Login** on the top right hand corner, enter the username and password you created. Get started! Remember, this 32 hour course is not something you can finish in 10 hours; it actually makes you go through all 32 hours (like traffic school online when you get a ticket).

You should be studying and preparing yourself to take and pass the exam on your first attempt. Sometimes people get very nervous about taking exams, but this one is not to be feared. Don't let people, whether it's in the office or outside, scare you about the exam. If they are trying to do this it's most likely they didn't pass and they want to make it seem tougher than it is. (Don't you just love human nature?) If you run into a person who didn't pass this exam, I promise you it is because they either lacked the effort to prepare or they somehow got the wrong material to study.

This is totally in your control, but we are here to guide you the best we can. The online course includes test preparation questions to review. If you use these tools and study these questions, you will take the test with a smile on your face as you realize how many of the practice questions are word-for-word what you'll see on the exam. Also, take the test cram course with Renee Kelly which takes place at several of the Team Revolution offices. Check the New Visions Live website for class schedules or contact Renee directly at 818-975-0048. This class will help you compress timeframes and help prep you for the exam. It's a one-time only \$50.00 for this course, it is well worth it, and you may revisit the class at no charge.

STEP 2: Schedule and Taking the Examination

We recommend not taking your test the day after a BPM night. You can choose 9AM or 1PM (you must arrive 30 minutes early). The exam fee is \$41 if you go to the Dept of Insurance in Downtown L.A. or \$74 if you go to a PSI testing center (includes convenience fee).

Go to <https://candidate.psiexams.com> to schedule your exam:

- > **Register for an examination**

> **Government/State Licensing Agencies**

> **California**

> **Department of Insurance**

Select **CDI(\$37) or PSI(\$67) Life, Accident, and Health Agent Examination(Life Agent)**

Pay and complete billing information

Select **Schedule Exam**

(Taken from years of dealing with exams), get some good sleep the night before, and eat a decent breakfast before your exam.

Once you pass, aside from being elated that this process is over forever, they will fingerprint you and you will have the pleasure of paying \$61 for it. (I think they are using psychology on us: At what other time would we willing pay \$61 for fingerprinting than when we're on top of the world for acing their silly test?) Anyway the fee breaks down into \$10 for the service, \$19 to the FBI, and \$32 to the Dept of Justice.

STEP 3: Applying for a License with the State

Congratulations you have passed your exam! You will need to go to www.insurance.ca.gov to apply for your license. On the right hand side of the screen, go to **Online Services** and click on **Fast Licensing Application System (FLASH)**. After you are done filling out the application, they will require you to pay \$140 and you'll be on your way. This page will require some of your personal information (i.e. social security). The Department of Insurance will give you updates via email.

There is a Licensing class that is held once a month for our newly licensed associates that you are now qualified to attend. Congratulations! Please contact your designated Licensing Coordinator for scheduled dates and times.

STEP 4: Corporate Appointments

Before you get too excited, you will need to be appointed with our product providers to sell their products and get paid. There are some appointment forms for you to fill out, you can ask your designated Licensing Coordinator and they will be more than willing to help you fill out the forms. Then, you'll be able to pay the \$44 appointment fee. This covers the cost of appointing you with every company we do business with. Afterwards, you will be required to do some basic training classes online (Anti-Money laundering, IUL, 8hr Annuity, and Long Term Care). Once we get the good news that you are appointed with the companies the green light is on to go out and make some money!

Team Revolution

Code of Honor

Your value is determined by your service to others. Be humble and selfless. Mission First, Team Second, Self Last.

Healthy relationships thrive on open lines of communication. We believe in constant personal communication with leaders, teammates and clients.

Maintain professionalism at all times. Keep all time commitments and have appropriate dress at all times.

Be responsible and dependable. No blaming others and no excuses.

Be resourceful and solution oriented. (No whining)

Commit to personal development and be a student of the business. Attend all meetings and events and always take notes.

Seek first to understand before trying to be understood. Respect brings respect.

Deal direct – If you have a challenge with someone, deal directly with that person, or let it go.

Strive to find reasons to praise, encourage, and recognize at all times. Celebrate all wins.

All decisions should be win-win for all. We choose right over wrong, ethics over convenience, truth over popularity.

We don't participate in negative talk. Speak supportively with the intention to create a positive impact.

Field training is a privilege. Treat all appointments like gold and do your best with every one of them.

Be a coachable, grateful, positive, upbeat you!