

New Agent Checklist

- Sign Up For Licensing Course _____
- Enroll In Social Media Platforms (FB, Slack, etc.) _____
- Conference Call Schedule Worked into Calendar _____
- Schedule Test (for 2 weeks from start of course) _____
- Fingerprints _____
- Pass Test _____
- License Application _____
- License Issued _____
- HCMS Onboarding Complete & Profile Info Filled in correctly _____
- Anti-Money Laundering Course Complete _____
- Prosperity Life Appointment Applied For _____
- Carrier Appointments Applied For Through SuranceBay _____
- Requested Auxiliary Carriers in HCMS _____
- Bootcamp Complete _____
- Give All Agent Numbers To Admin & Added as Missing Carriers in HCMS _____
- Agent Numbers, Carrier Contact Numbers & Login Info On One Sheet _____
- Selling Binder (3/4" is fine) _____
- Scheduling Notebook/Day Planner _____
- Phone Dial Stats Sheet (10 printed) _____
- Credibility Sheet (15 printed, or 1 laminated) _____
- Financial Inventory Sheet (15 printed) _____
- Final Expense Phone Script _____
- Final Expense Presentation Script _____
- Mortgage Protection Phone Script _____
- Mortgage Protection Presentation Script _____
- Door Knocking of Leads Script _____
- Create Login Info For Eapps (Americo, Transamerica, Prosperity, etc.) _____
- Order Leads!! It's Go Time! _____