**NEW AGENT CHECKLIST**

**Please do yourself & your Manger a favor…. Please let them know when you have completed each step. Do not hesitate to call with questions or ask for help. If we don’t know where you are at we cant help you.**

**FACT… the one with the most questions WIN!!!**

**STEP 1 – CONTRACTING** (Must have insurance license) (Skip to Step 2 if you do not have your insurance license)

\*Refer to the “Helpful hints AML & E&O)

◻ RegED AML Certificate – E-mailed to contracting and your manager

◻ E&O Insurance (Some carriers do not require) E-mailed to contracting and your manager

◻ Contracting Profile, Surancebay Emails, Lead Access

◻ Print Carrier Contracting Check List out on the www.Reabergroup.com website

◻ \*Text or email your manager when you have completed Carrier Contracting

**STEP 2- GOAL SETTING & SCHEDULE**

◻ Add Weekly Conference Call Schedule on your calendar (to find this go to www.Reabergroup.com website) calls

◻ Attend an Equis Training Camp (ETC) near you

◻ Register for National Convention

◻ Set Income Goals

◻ Set Schedule

◻ Join the Reaber Group (GroupMe App)

**STEP 3- GET YOUR BAG READY**

◻ Print the Application Check List and then print the applications for each product (STEP 1 must be completed first)

◻ Print Underwriting Grids, Product Tables, and In-Home Tools and put in a folder (these will be used all the time)

◻ Watch the videos that are on ReaberGroup website “Agent Tools” at the bottom. There are 3 on the bottom of the page #1. Underwriting Guide & Misc. Folder #2 Tool Box #3 Stay organized so you get paid

◻ Print the NEEDS ANALYSIS Worksheet

**STEP 4- TECHNOLOGY**

◻ Create shortcuts on phone and tablet for carrier quoting tools

◻ Download CFG quoting apps for Term and Final Expense

**STEP 5- ACCESS LEAD SYSTEMS & BUY LEADS**

◻ Request access to OPT (must be contracted, refer to STEP 1 if not already completed)

◻ **Do NOT pay for OPT upgrade**-choose option that says not interested

◻ Set-Up MailCo account

◻ Review your first lead order with your Manager

**STEP 6- PHONE SCRIPTS**

◻ Print phone scripts

◻ D Lead & Final Notice Mailing training

◻ Watch Bill Martin's Live Dials training – Equis Training Site

**STEP 7- IN-HOME PRESENTATION**

◻ View In-Home Presentation videos

◻ Attend Bill Martin's Jumpstart training webinar – Every Wednesday 11am EST Last Updated:

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