

# High Standard Promotion Guideline

V1.0

We are very proud to hold a high standard for our business as below

## Associate promotion

### Option 1 - 3/3/30

- Recruit date is the start date in WFG system and can be found during associate search
- 5k minimal production required for 3/3/30
- Sales date is the client signature date. The same elite rule would apply, for example, for life insurance, if no deposit, no points yet, it cannot be counted. For annuity or investment, the fund has to be cleared to count.

### Option 2 - 20k points production in 3 months

- If promoted by 20k-3 months, all the cases counted towards the 20k must be approved and delivered and 2nd commission needs to be advanced, before the promotion is granted.
- If split, the promoting agent can only count the half points
- Only 50/50 split allowed in any sales

### Other considerations

- Special case - to encourage associates not to hold their own family cases, their own family cases points can be counted for 20k or 3/3/30, regardless of when they are opened.

## MD Promotion

### MD promotion requirement: 5 licenses

- License must be appointed with active E&O payment to be counted
- 5 team license - This doesn't count the self license for the MD-to-be person
- 5 team license - At the time of promotion month end if 5 active appointed team licenses in the system this condition is met

### MD promotion requirement: 3 associates

- At the time of promotion month end, if 3 Associates from 3 different legs in the system this condition is met
- Associates do not have to be direct but need to come from 3 different legs

### MD promotion requirement: 40K points/ 3months

- Leader bulletin calendar month end numbers only - 3 full months. For example, not counting from mid of month such as 2/17-5/17

- The points have to hit at the months of promotion for this condition to be considered met. For example, if points for Jan Feb March are over 40K but licenses/structure condition met in April, the points would need to be recalculated for Feb, March, April for re-qualification.

### **Other considerations**

- It's suggested to go over MD benefits such as higher contract, vested contract to keep renewals, eligible for MD thumb drive, MD school etc, as well as responsibilities such as office plugin, contest contribution, increased E&O and BPM roles etc before running for MD promotion.
- After MD promotion, MD is expected to be trainer for their team to help their team to close recruit, sales, fast start and move team to major events.
- For MD promotion, at least one associate leg is promoted by 3/3/30
- General rule - each recruit or sale can only be used once towards a promotion. And always promoting the down line first before promoting up line. (need discussion ) - No double counting
- General rule - Transferred associate needs to wait for 6 months to count towards up line's Associate and SA promotion and 9 months towards up line's SMD promotion.

### **SMD Promotion**

- Spouse in general should not be the MD for SMD promotion