



WORLD FINANCIAL GROUP

Pleasanton Office BPM Schedule
4305 Hacienda Dr. Suite #350, Pleasanton, CA 94588

Jan/Feb

Schedule		BPM		TRAINING			HOST TEAM		
Date	Time	Introduction	Presenter	Team MC	Trainer	Topic	Registration	Security	Chairs
1/25 Wed	10:00 AM	Ricky Huynh	John Chan / Holly La	Sam Low	Dominic Leung Nancy Ho	Insurance 101 Recruiting Presentation	Holly's Team	Penney's Team	Nancy's Team
1/28 Sat	7:30 PM	Michael Cherman	Tuyen Tran / Walter Hughes	Holly La	Dr. Timothy Tsoi	Health and Wealth (Open to Public)	Tuyen/David Team	Jacky's Team	Jenny's Team
2/1 Wed	10:00 AM	Clarence Decano	John Chan / Nancy Ho	Yuling Feng	Dominic Leung Kevin Lin	Business 101 How to Prospect & Invite	Jacky's Team	Nancy's Team	Tuyen/David Team
2/4 Sat	7:30 PM	Bitu Hamidi	Clarence Decano / Alyssa Nguyen	RJ Tolosa		Upstart School	Jacky's Team	Jenny's Team	Tuyen/David Team
2/8 Wed	10:00 AM	Tracy Tran	Walter Hughes / Tuyen Tran	Alyssa Nguyen	Tu Bui John Chan	Finance 101 Handling Objection	Nancy's Team	Holly's Team	Penney's Team
2/11 Sat	7:30 PM	Bruce Duong	Dominic Leung / Yuling Feng	Ricky Huynh	Chris Sheckley	Client Seminar by Prudential (Open to Public)	Nancy's Team	Nancy's Team	Albert's Team
2/15 Wed	10:00 AM	Gabe Alabanza	John Chan / Princess Baylosis	Lien Le	Alyssa Nguyen Holly La	Insurance 101 Sale Presentation	Tuyen/David Team	Jacky Team	Albert's Team
2/18 Sat	7:30 PM	Lien Le	John Chan / Tuyen Tran	Lea Reyes	Joany Yui	Taxation (Open to Public)	Nancy's Team	Albert's Team	Penney's Team
2/22 Wed	10:00 AM	Daniel Gunadi	John Chan / Nancy Ho	Patricia Lam	Sam Low Jacky Tam	Business 101 Fast Start	Peggy's Team	Nancy's Team	Holly's Team
2/25 Sat	7:30 PM	Ricky Huynh	Princess Baylosis / Sam Low	Dominic Leung	Tuyen Tran	Retirement Challenge and Solution	Albert's Team	Penney's Team	Holly's Team

Topic / Trainers are subject to change

Special Events:

3/4: Elite Circle Phase 18 Orientation @ Santa Clara Convention Center