

**UBUNEX**

## 30-DAY NEW AGENT REQUIREMENTS

Name: ..... Start Date: .....

Certified Field Trainer: ..... End Date: .....

- ❖ Business Plan Completed.
- ❖ Financial Needs Analysis Completed.
- ❖ Grand Openings
- ❖ Attend minimum of 10 MACHO Field Trainings

Date: ..... Trainer Signature: .....

Date: ..... Trainer Signature: .....

Date: ..... Trainer Signature: .....

- ❖ Attend Next Fast Start Class  
(Every 3<sup>rd</sup> Saturday 10 am – 3 pm PST)
- ❖ Completed Ed Mylett Training Audio (USB)
- ❖ Complete 10 Training Classes
- ❖ Attend ALL Tuesday Trainings  
(6 PM – 8:30 PM PST)
- ❖ Complete 52 Hours State Licensing Course

CLASS #1: Orientation

CLASS #6: Business Format System Pipeline

CLASS #2: Evolution of Insurance: IUL

CLASS #7: Website, Tools &amp; Resources

CLASS #3: Client's Experience

CLASS #8: Compensation Class

CLASS #4: Wealth Transfer Class: Annuities

CLASS #9: Budgeting

CLASS #5: Field Training System

CLASS #10: Scripting Scripting

- ❖ Attend a minimum of 2 Phone Zones
- ❖ Earn a Promotion (Champion's Path)