



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:

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- ❖ Attend Fast Start Class
(Every Saturday 9:00 am PST/12:00 pm EST)
- ❖ Read First 3 Chapters of Money, Wealth, Life Insurance.
- ❖ Complete Top 25 Dream Worksheet
- ❖ Attend All Wednesday Trainings
(6:00–7:30 pm PST)
- ❖ Complete State Licensing Course/Hours.

PHASE 1 SCHEDULE

WEEK 1:

(Avg. Hours: 5)

Complete Week 1 Onboarding

Schedule Test Date

Complete Client Experience

Attend Fast Start School With Camera On

WEEK 2:

(Avg. Hours: 4)

Complete Week 2 Onboarding

Top 3 Potential Business Partners

Business Partner Marketing Plan

Pass Life License Exam

Finger Printing & Apply For Life License

Week 2 Onboarding must be completed by an MD & Above

30-DAY NEW AGENT REQUIREMENTS (Cont.)



WEEK 3:

(Avg. Hours: 4)

Complete Week 3 Onboarding

Complete All Remaining Licensing Requirements

Shadow Any Appointments You Can

WEEK 4:

(Avg. Hours: 4)

Complete Week 4 Onboarding / Scripts Training

Become Fully Appointed

Start Setting & Doing Field Training Appointments

PHASE 2 - 5 SCHEDULE

PHASE 2:

(Month 2)

Complete 10 Qualified Field Training Appointments

Earn Your Associate Promotion or Senior Associate Promotion

Become a Net License

PHASE 3:

(Month 3)

Become a Certified Field Trainer

Master Top 5 Products

PHASE 4:

(Month 4 - 6)

Earn Your Marketing Director Promotion

Earn Your \$50,000 Watch

PHASE 5:

(Month 7 - 12)

Earn Your \$100,000 Ring

Earn Your Executive Marketing Director Promotion