

OUR SYSTEM TO A **FAST START**



PINNACLE LEADERSHIP DEVELOPMENT

Name: _____ Code Number: _____

Date Started: _____

Certified Field Trainer: _____

Senior Marketing Director: _____

Goals

What is most important to you and your future?

Retirement _____ Home _____ Retire Parents _____ Make & Save Money _____

Education _____ Vacation _____ Travel _____ Other _____

Let's get to know you better.

Favorite sports team: _____

Favorite restaurants: _____

Favorite color: _____

Hobbies: _____

Partner's Name: _____

Kids' Names: _____

6 Basic Human Needs

What are your **2** most important needs that must be fulfilled?

- Certainty: assurance you can avoid pain and gain pleasure
- Uncertainty/Variety: the need for the unknown, change, new stimuli
- Significance: feeling unique, important, special or needed
- Connection/Love: a strong feeling of closeness or union with someone or something
- Growth: an expansion of capacity, capability or understanding
- Contribution: a sense of service and focus on helping, giving to and supporting others

The System: 6 Steps to Success

Step 1: Interview



1. Get your associate code number
2. Collect & call the top 3 business partners
3. Schedule your personal financial orientation within 24-48 hours
4. Attend the **Crusade class**

Step 2: Financial Orientation



1. Complete the 7-Day Standard
2. Complete your personal financial review
3. Set up 3 qualified appointments
4. Attend the **Orientation class**

Step 3: Business Plan



1. Get your Associate promotion (3-3-30)
2. Develop prospect lists (4 Top 25 Lists)
3. Schedule your Life exam
4. Attend the **Scripting class**

Step 4: Start Up



1. Learn the scripts
2. Invite 10 guests to BPM/BMP
3. Set up 10 qualified appointments
4. Attend the **Systems class**

Step 5: Field Training



1. Complete 10 qualified appointments
2. Get your Life license & get appointed to 10 different companies
3. Get certified by your SMD on the field training presentation
4. Attend the **General Session Licensed Agents class**

Step 6: Duplication



1. Repeat steps 1-5 with all new associates
2. Develop field trainers & elite trainers
3. Earn SMD promotion and build & develop leaders
4. Attend the **Advanced class for CFT's only**



10 Reasons **Why You Need To Win**

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____
- 6. _____
- 7. _____
- 8. _____
- 9. _____
- 10. _____

Success formula

Wealth = Mental Toughness + Opportunity



The System Tracker

Steps 1 through 6 must be completed to build a successful, thriving business. If you can teach this system to a network of people, you can earn passive income for the rest of your life.

Step 1

Interview

Date Completed: _____

Step 2

Financial Orientation

Date Completed: _____

Step 3

Business Plan

Date Completed: _____

Step 4

Start Up

Date Completed: _____

Step 5

Field Training

Date Completed: _____

Step 6

Duplication

Date Completed: _____

Step 1: Interview

Business code number: _____

Collect & call Top 3 business partner candidates.

Name

Phone

_____	_____
_____	_____
_____	_____

Schedule your Personal Financial Review:

Scheduled Date: _____

Attend the Crusade class

Completion Date: _____



Step 2: Financial Orientation

- Complete the 7-Day Standard
- Complete your Personal Financial Review
- Set up 3 qualified appointments
- Attend the Orientation class

Completion Date: _____

7-Day Standard

1. ___ Get a Business Code Number.
___ Collect & call Top 3 business partner candidates.

Name	Phone
_____	_____
_____	_____
_____	_____

2. ___ Become a client.
___ Collect & call Top 3 client candidates.

Name	Phone
_____	_____
_____	_____
_____	_____

3. ___ Develop a Top 100 List.
___ Profile the list into 4 separate Top 25 lists.

4. ___ Meet with Top 3 (Hot Market).

BPM / 1-on-1 / KTP

5. ___ Register for the next big event _____

NLA, Convention, Clozer's College, Super Saturday, Wealth Bowl, Fast Start School

*Complete 7-Day Standard and receive a special **Fast Start** award.*

Personal Financial Review

The 5 Magic Questions

- At what age do you want to retire?

- How much money would you like to have saved total, when you do retire?

- How much income per month would you like to live on for the rest of your life?

- What are some of your goals and dreams in retirement?

- If we can put together a plan to show you how to achieve all this, would you be open to seeing it? Yes / No

DIME Number

If you want to protect you and your loved ones, you need the right amount of coverage.

Do you want to leave your family debt-free? Yes / No

Debt:

Do you want your income to continue coming to your family? Yes / No

Income x 10:

Do you want to pass on the home or mortgage to your family? Home / Mortgage

Mortgage:

Do you want to leave money for your kids' college or miscellaneous expenses? Yes / No

Education:

Insurance can take care of all of this for you.

Total Insurable Need:

Are you properly diversified? Are you structured for a maximum income in retirement?
How much money do you have in each bucket?

Taxable
Savings, Stocks, etc

Tax Deferred
401k, IRA, Pension, etc

Tax Advantage
Roth IRA, IUL, Bonds, etc

Step 3: Business Plan

- Get your Associate promotion (3-3-30)
- Develop your prospect lists (4 top 25 lists)
- Schedule your Life license exam

Date: _____

- Attend the Scripting class

Completion Date: _____

- Challenge new associate to 10-10-30 (Champion's Path)
55% contract – Senior Associate

The Wealth Formula

- A. How much money do you want to make? \$ _____
- B. What is your contract level? _____ %
- C. What is the average savings per family a month (\$500)? \$ _____

Use the letters from above to complete the formula below:

$$\boxed{A} \div \boxed{B} = \boxed{P} \text{ Points}$$

$$\boxed{P} \div 12 \text{ months} = \boxed{S} \text{ Total amount of savings}$$

$$\boxed{S} \div \boxed{C} = \boxed{D} \text{ People to come on board (Round up)}$$

To have enough people come on board this month to earn what you want, you must know the numbers.

10 :: 6 :: 3 :: 1

If you **call** 10 people,
6 will say yes,
3 will show up,
1 will come on board.

D. People to come on board: D

Formula: 10 x D :: 6 x D :: 3 x D :: 1 x D

Your Numbers: _____ :: _____ :: _____ :: _____

So now you know how many calls to make to earn what you want and create and build your business.

For example, an associate needs 2 people to come on board to earn \$5,000, your numbers would be:

10 x 2 :: 6 x 2 :: 3 x 2 :: 1 x 2

Call **20** people :: **12** say yes :: **6** show up :: **2** will come on board

Memory Jogger

Complete Top 25 Target Market Lists

Coworker	Doctor	Realtor	Fisherman	Father	Bus Driver
Boss	Surgeon	Department Store	Tennis Player	Mother	Chamber of Commerce Member
Supervisor	Hospital Worker	Employee	Skier	Cousin	Hotel Employee
Manager	Chiropractor	Cosmetics Salesperson	Dart Player	Aunt	Radio Announcer
Executive Assistant	Therapist	Grocery Store Employee	Softball Player	Uncle	Sportscaster
Personnel Manager	Pharmacist	Convenience Store Employee	Baseball Player	Grandfather	Writer
Partner	Eye Center Employee	Convenience Store Employee	Football Player	Grandmother	Journalist
Salesperson	Social Worker	Cashier	Soccer Player	Niece	Editor
Customer	Direct Salesperson	Vending Salesman	Racquetball Player	Nephew	Publisher
Landlord	Auto Mechanic	Farmer	Basketball Player	Sister's In-laws	Pilot
Parking Attendant	Car Salesman	Caterer	Handball Player	Brother's In-laws	Flight Attendant
Coffee Shop Patron or Barista	Auto Repairman	Restaurant Owner	Swimmer	Best Friend	Air Traffic Control
Car Pool	Auto Supply Salesman	Waitress	Mountain Climber	Spouse's Best Friend	Travel Agent
Lunch Friend	Tire Store Employee	Waiter	Hiker	Babysitter	Antiques Dealer
Competitor	Teacher	Chef	Camper	Neighbor	Fundraiser
Someone Who Hates Losing	Substitute Teacher	Baker	Jogger	Parents' Neighbor	Tree Surgeon
Union Member	Accountant	Cook	Plays Bridge	Friends of Parents	Railroad Conductor/Worker
Complainer	Banker	Dishwasher	Plays Bingo	Best Man	Game Warden
Inspector	Bank Teller	Cabinetmaker	Plays Table Tennis	Maid of Honor	Veterinarian
Pension Plan Manager	Credit Union Employee	Hardware Store	Plays Pool	Matron of Honor	Cat Lover
Delivery Person	Payroll Clerk	Truck Driver	Hang Glider	Bridesmaids	Dog Lover
Express Mail Person	Notary Public	Funeral Director	Enjoys Karate	Ushers	Animal Trainer
Mailman	Policeman	Flower Shop Employee	Fire Chief	Fellow Church Members	Doll Maker
Someone Who Lost a Job	Highway Patrolman	Dry Cleaner	Fireman	Sunday School Teacher	Health Food Shop
Someone Who Almost Lost a Job	Security Guard	Electronics Store Employee	Ambulance Driver	Army	Seamstress
Friend Who is Job Hunting	Armored Car Driver	TV Repairman	Scoutmaster	Navy	Bookworm
Someone Who Hates His/Her Job	Highway Dept. Employee	Locksmith	Den Leader	Air Force	Lawn Maintenance
Someone Who Wasn't Promoted	Contractor	Upholsterer	Barber	Marines	Cell Phone Contact
Someone Wanting to Work Part-Time	Home Builder	Furniture Repairman	Beautician	Civic Club	Email Contact
Walking Encyclopedia	Carpenter	Appliance Salesperson	Health Spa Employee	Jaycees	Satellite TV Serviceman
Likable Person	Plumber	Cable TV Repairman	Tanning Salon Employee	Kiwanis	Engineer
Movers/Shakers	Painter	Office Supply Salesman	Auctioneer	Lions Club	Computer Technician
Clergyman	Roofer	Machine Shop Employee	Photographer	Principal	Computer Sales
Lawyer	Insulator	Phone Installer	Guidance Counselor	Teacher	Computer Programmer
Nurse	Landscaper	Pest Control Employee	Youth Director	Coach	Computer Whiz
Dentist	Architect	Carpet Cleaners	Sister-in-law	Music Teacher	Software Programmer
Orthodontist	Surveyor	Bowler	Brother-in-law	Piano Teacher	Computer Gamer
	Carpet Installer	Hunter	Father-in-law	Piano Tuner	Graphic Designer
	Electrician	Golfer	Mother-in-law	Dance Teacher	Printer
	Repairman		Brother	Professor	
	Home Siding Salesperson		Sister	Librarian	



Top 100 List

Name	Profile
	12345678

Associate Name: _____	SMD: _____
Date Completed: _____	SMD Approval: _____

	Name	Profile		Name	Profile		Name	Profile		Name	Profile
1		12345678	26		12345678	51		12345678	76		12345678
2		12345678	27		12345678	52		12345678	77		12345678
3		12345678	28		12345678	53		12345678	78		12345678
4		12345678	29		12345678	54		12345678	79		12345678
5		12345678	30		12345678	55		12345678	80		12345678
6		12345678	31		12345678	56		12345678	81		12345678
7		12345678	32		12345678	57		12345678	82		12345678
8		12345678	33		12345678	58		12345678	83		12345678
9		12345678	34		12345678	59		12345678	84		12345678
10		12345678	35		12345678	50		12345678	85		12345678
11		12345678	36		12345678	61		12345678	86		12345678
12		12345678	37		12345678	62		12345678	87		12345678
13		12345678	38		12345678	63		12345678	88		12345678
14		12345678	39		12345678	64		12345678	89		12345678
15		12345678	40		12345678	65		12345678	90		12345678
16		12345678	41		12345678	66		12345678	91		12345678
17		12345678	42		12345678	67		12345678	92		12345678
18		12345678	43		12345678	68		12345678	93		12345678
19		12345678	44		12345678	69		12345678	94		12345678
20		12345678	45		12345678	70		12345678	95		12345678
21		12345678	46		12345678	71		12345678	96		12345678
22		12345678	47		12345678	72		12345678	97		12345678
23		12345678	48		12345678	73		12345678	98		12345678
24		12345678	49		12345678	74		12345678	99		12345678
25		12345678	50		12345678	75		12345678	100		12345678



Potential Business Partners

Associate Name: _____	Trainer: _____
Date Completed: _____	SMD: _____

	Name	Phone	City	BPM	HI	KTP	1on1	Notes
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								
18								
19								
20								
21								
22								
23								
24								
25								



Potential Clients (MACHO)

Associate Name: _____	Trainer: _____
Date Completed: _____	SMD: _____

	Name	Phone	City	BPM	HI	KTP	1on1	Notes
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								
18								
19								
20								
21								
22								
23								
24								
25								



Out of State/ Out of Town Referrals

Associate Name: _____	Trainer: _____
Date Completed: _____	SMD: _____

	Name	Phone	City	BPM	HI	KTP	1on1	Notes
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								
18								
19								
20								
21								
22								
23								
24								
25								



High Identity / Business Owners

Associate Name: _____	Trainer: _____
Date Completed: _____	SMD: _____

	Name	Phone	City	BPM	HI	KTP	1on1	Notes
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								
18								
19								
20								
21								
22								
23								
24								
25								

Step 4: Start Up

1. Learn the scripts:
 - ETHOR script
 - BPM Invite script
 - Pass the Phone script
 - Answering Questions
2. Make calls with your trainer using the top 100 list to:
 - Invite 10 guests to the BPM
 - Set up 10 qualified appointments
3. Attend the Systems class

Completion Date: _____

Script: ETHOR

Hi (potential client) this is (trainee) (Make small talk).

I don't know if you've heard, but I recently took a position with a financial firm and I am really **EXCITED**. I'm in their **TRAINING** program, which includes licensing and 10 appointments in the field.

My goal is to get my 10 training appointments done **THIS** week and I need your **HELP!**
You'll help me out...right?

("What is it?")

I value your **OPINION** and was hoping you would support me.

It's about 45 minutes and we'll just pop by and show you all the things we do and how we help people, then in the future you can send me some **REFERRALS**.

If nothing else I can get my training out of the way. Sound good?

CLOSE: Great, so which day this week works best for you and [spouse's name]?

Does morning, afternoon, or evening work best? (Give them two times to choose from.)

Your place or our office?

Great, I'll be bringing one of the top trainers from the office with me.

See you on __ at __ o'clock!

Note: Schedule for ANY day except Wednesday evening after 6:30pm and Saturday morning between 10am-1pm -you'll be in training.

CONFIRM: By the way, since I know you are super busy and I am bringing my trainer, I want to go ahead and confirm our appointment now. I promise not to cancel on you and I hope you can do the same, right?

Script: Answering Questions

What do you do?

I'd love to explain all of it, but I'm still new. Basically we help people make and save money, everyone likes to do that right? CLOSE

Or

We show people how to make and save money, everyone likes to do that - right? CLOSE

What's the name of the company?

Have you heard of Transamerica? You know the big pointy building in San Francisco?

You've heard of them right? CLOSE

Or

Have you heard of Pinnacle Leadership Development? We show people how to make and save money, everyone likes to do that - right? CLOSE

Do I have to buy anything?/ Are you trying to sell me something?

No commitments ... it's just for my training/promotion. Then in the future, maybe you can give me referrals. Sound good?

CLOSE

If they keep asking questions:

Listen, I really value your opinion and worst case scenario you could just send me some referrals down the road. That's all. No big deal. Sound good? CLOSE

Script: BPM Invite

Hey ____ . How are you doing? (Make small talk)

Hey, what do you have going on Wednesday night / Saturday morning?
Well, let me tell you why I was calling.

I just recently started with a financial firm and I'm really **EXCITED** about the position.

We are having an open house and I would love to have you as my guest. I respect your **OPINION** and I would really like it if you came down and took a look at what we do. Then maybe you can send me some **REFERRALS** down the road. Fair enough?

CLOSE: It starts at 7pm/10am, do you have a pen? Let me give you the office address real quick. (Or offer to pick them up.)

It's a professional environment, so make sure you come in business attire. Thanks, I look forward to seeing you then!

CONFIRM: By the way, since I know you are super busy and I am to. I want to go ahead and confirm your attendance now, so I can put you down as my personal guest. I can count on you, right?

Objection #1: What is the name of the company?

We work with a company called Transamerica; you know the big pointy building in San Francisco?
[GO TO THE CLOSE]

Objection #2: What do you guys do?

We show people how to make and save money, everyone likes doing that right? **[GO TO THE CLOSE]**

Objection #3: Is this one of those multi-level/pyramid things?

No, we work with Transamerica; are you familiar with the financial industry? **[GO TO THE CLOSE]**

Objection #4: If they ask anything else that you don't know how or don't want to answer:

Listen, like I said I just started and I don't know everything. It would do both you and me no good if I tried to explain it to you over the phone. Whatever questions you have, save them for the presentation and I'm sure they will be answered. **[GO TO THE CLOSE]**

Script: Pass The Phone

I don't know if you've heard that I just got started part time with a financial firm and my trainer asked me to call you.

His/her name is (trainer name) and he/she is here with me now. I'm going to pass the phone to him/her.

{PASS THE PHONE}

TRAINER: Hi (potential client) just like (trainee) said --- The reason we are calling together is that (trainee) started in our training program and we asked him/her who he/she trust and respects and your name was at the top of his/her list.

(Wait for response.)

(trainee) needs to complete some training appointments and since we have you both on the phone, we were confident you would be able to help us out --- right?

What day works for you, Thursday or Friday _____ or _____ ?

Morning, afternoon, or evening work?

6pm or 8pm _____ or _____ ?

Would it be best to meet at your home or our office?

Do you have a pen and I'll give you the address.

Great, we will see you _____.

Please hold on real quick, (trainee) wants to say "Bye".

TRAINEE: Thanks for supporting me and my training. We're excited to see you _____.

Important note: Trainer must have the trainee's current availability schedule for the coming week in front of them when making calls.

Script: Career Night/Day

Hi my name is _____. May I speak with _____ ?

Hi _____, (associate name) spoke highly of you.

They passed on your name and number and thought you should interview with our company.

Because our company is aggressively expanding, we are hosting a career night Wednesday (career day Saturday). You will be able to learn about our company, how we help families and business owners and details of our compensation package.

If you qualify we will schedule a 1-on-1 interview with one of our brokers for the multiple positions we have available. Sound good?

[Yes]

Great, after we hang up I will send a confirmation text to this number with my name, the date and time of the event, as well as the office address.

This will be a professional/business environment so please dress accordingly.

You will get a confirmation call the day before from my assistant since seats are limited. See you soon!

Sound good?

[No]

Ok, what would work better for you later this week or this weekend?

Ok, Thursday or Friday?

Morning or afternoon?

2 or 4 o'clock?

Great! After we hang up I will send a confirmation text to this number with my name, the date and time of our appointment and the office address.

First impressions are everything so please dress professionally.

Script: 3 Good Qualities

Hello, may I speak to _____.

Hi (potential business partner) this is (trainer), (trainee) asked me to give you a call.

The reason I am calling is because (trainee) recently took a position with our company and because of our expansion plans, I asked them if they knew anybody that would be a good addition to our firm.

(trainee) mentioned your name and said that you were ambitious, money motivated and have good leadership skills. (or utilize 3 other personalized & positive characteristics)
Is this true about you?

Great! People with those qualities tend to excel with our company. So based upon what (trainee) said about you, and the respect they have for me, I figure it makes sense for us to get together and meet.

What day this week works better for you? _____ or _____?

Do mornings, afternoons, or evenings work best? (Give them two times to choose from.)

Do you have a pen? Let me give you my office address real quick.

CONFIRM:

By the way, I know you are super busy and I am too, so my assistant will call you the day before to confirm our appointment. I would never cancel our appointment and I hope you would do the same. Sound good?

See you _____ at _____ ! Bye!

Bring 10 Guests to BPM

Bringing guests to the company overview is the easiest and fastest way to build your business. Guests will see both sides of what we do – client side and business side.

Name	Phone	Date	Completed?
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____
5. _____	_____	_____	_____
6. _____	_____	_____	_____
7. _____	_____	_____	_____
8. _____	_____	_____	_____
9. _____	_____	_____	_____
10. _____	_____	_____	_____

Set Up 10 Qualified Appointments

MACHO Field Training Appointments

Go out with a Qualified Trainer for Field Training

Participate in at least 10 sessions with a qualified trainer. Remember to have your field trainer sign this form to verify the training was completed.

Name	Phone	Date	Trainer Sign Off
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____
5. _____	_____	_____	_____
6. _____	_____	_____	_____
7. _____	_____	_____	_____
8. _____	_____	_____	_____
9. _____	_____	_____	_____
10. _____	_____	_____	_____

Step 5: Field Training

- Schedule and pass your Life license exam
- Get appointed with the 10 companies we work with
- Complete your 10 qualified field training appointments
- Study the KTP presentation and get certified by your SMD
- Attend the **General Session Licensed Agents class**

Completion Date: _____



10 Steps to Becoming a Field Trainer

1. Complete steps 1-4 of our system
2. Complete 10 qualified field training appointments
3. Earn your associate promotion (3-3-30)
4. Get Life licensed & appointed
5. Become a client, if suitable
6. Be coachable and in alignment with your SMD
7. Be accountable daily to your SMD
8. Attend all BPMs and Big events
9. Know how to cloze in all aspects of our business
10. Get signed off by your SMD on the presentation

CFT vs Elite Trainer Qualifications

Certified Field Trainer

1. Be a client.
2. Be an Associate or higher.
3. Be licensed & appointed.
4. Know the BIG 3 products
(Term LB, Everest, Million Dollar Baby)
5. Signed off by your MD

Recognition

- Silver Name Badge
- Padfolio

Elite Certified Field Trainer

1. Complete 50 qualified appointments.
2. You are a Marketing Director and part of the Frontline.
3. You have your \$50,000 Watch.
4. Know the BIG 7 products
(Term LB, Everest, Legacy Shield, IUL, FIA, Million Dollar Baby, 2nd to die)
5. Signed off by your SMD.

Recognition

- Black Name Badge
- Briefcase

CFT Evaluation Sign Off

Trainer: _____ SMD Name: _____ Date: _____

5 Steps to a Winning Presentation

1. FORM Curiosity - Connection	Pass / Needs Improvement / Fail	
2. Personal Crusade Story Give yourself Credibility	Pass / Needs Improvement / Fail	
3. Credibility Aegon/Transamerica/Providers	Pass / Needs Improvement / Fail	
4. Rules of Money Rule of 72/Money Grows/Money Taxed	Pass / Needs Improvement / Fail	
5. Put Value on Follow Up Set up the Follow Up Meeting	Pass / Needs Improvement / Fail	

Total Score: _____ / 5 PASS / FAIL

Comments

Pass: 1 pt / Needs Improvement: 0.5 pt / Fail: 0pt

** Must get 4/5 or higher score to pass.*

Elite CFT Evaluation Sign Off

Trainer: _____ SMD Name: _____ Date: _____

Elite Certified Field Trainer 10 Steps to a Winning Presentation

1. FORM Curiosity - Connection	Pass / Needs Improvement / Fail	
2. Personal Crusade Story Give yourself Credibility	Pass / Needs Improvement / Fail	
3. Credibility Aegon/Transamerica/Providers	Pass / Needs Improvement / Fail	
4. Infinite Banking Money, Wealth & Life Insurance Book	Pass / Needs Improvement / Fail	
5. Rules of Money Rule of 72/Money Grows/Money Taxed	Pass / Needs Improvement / Fail	
6. 401(k) Drawing – Show Article Cloze on Rollover Cloze on IUL – Show Article	Pass / Needs Improvement / Fail	
7. 6 Steps to Financial Independence 5 Magic Questions	Pass / Needs Improvement / Fail	
8. DIME Sheet / 5 Magic Questions	Pass / Needs Improvement / Fail	
9. Leave Something/ Take Something	Pass / Needs Improvement / Fail	
10. Put Value on Follow Up Set up the Follow Up Meeting	Pass / Needs Improvement / Fail	

Total Score: _____ / 10 PASS / FAIL

Comments

Pass: 1 pt / Needs Improvement: 0.5 pt / Fail: 0pt

** Must get 8/10 or higher score to pass.*

Step 6: Duplication

- Repeat steps 1-5 with all new associates
- Develop field trainers and elite trainers
- Earn your SMD promotion and build & develop leaders
- Attend the **Advanced class for CFT's only**

Completion Date: _____

10 Ways to Duplicate

1. Build a connection.
2. Keep it simple.
3. Make sure it's doable.
4. Role play / Role play / Role play
5. Make sure it's fast.
6. Spend time with your new associate transferring your skills.
7. Be a copy worth copying.
8. Make sure it's clear.
9. Use things they will remember (stories sell).
10. Be a do it first leader (doing it is how you retain).

Getting Ready for SMD

Top 25 Steps to Prepare for SMD

1. 100,000 Gross Team Points in 3 months rolling
2. 75,000 Net Team Points in 3 months rolling
3. 37,500 Personal Points in 3 months rolling
4. 37,500 Team Points in 3 months rolling
5. Cash Flow 12 Months Rolling
 - \$50,000 = Watch
 - \$100,000 = Blue Ring
 - \$250,000 = Red Ring
6. Qualified Exchange Legs(s)
 - 1 really strong leg
 - 2 average legs
7. 80% Persistency or Higher (70% worst case)
8. Minimum 1 direct MD or 2 Direct SA
9. Show leadership skills (Start conference calls, in business full time, attend meeting after the meeting, a part of BPM, etc.)
10. Speak in front of a crowd (Open/Close BPM, do trainings)
11. Are coachable and in alignment with your SMD & CEO
12. Show up to blow up – 90% attendance to all events and trainings
13. Signed off as a Certified Elite Field Trainer by your SMD
14. Personal Development 1 hour per day
15. Graduate Next Level Academy (NLA)
16. Are an Elite Trainer – completed at least 50 personal qualified appointments
17. Your significant other is involved and supports your business
18. You are a client and believe in what we do
19. Understand you will take full responsibility (Buy name badges, host conference calls, conduct meetings after the meetings)
20. You have your Health License
21. You have your Blue Builder's Blazer (5-5-30 3 months in a row as well as 40,000 points in those 3 months)
22. You have a Certified Operations Officer (COO) as your assistant
23. You're in the business full time
24. You have an office
25. You have done DDR 3 months in a row

Benefits of SMD

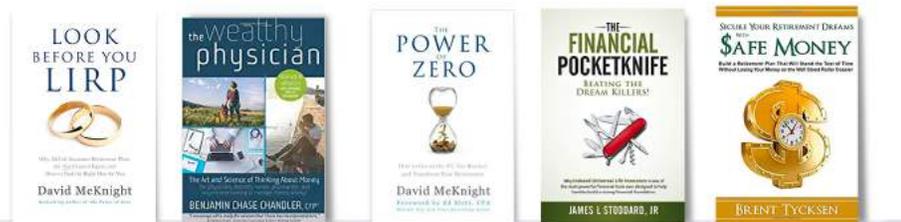
Top 25 Benefits to Look Forward To

1. You are in a High Level Leadership position – you get to study all other successful SMD's in Pinnacle
2. You are at the highest contract level (80%)
 - \$1,000 in premium = \$10,000 a month in cash flow
3. You now have access to get a monthly production bonus
 - 25,000 points or more = 4% bonus on average (70%+ persistency)
4. As a qualified SMD you get to go to Pinnacle SMD Academy in Atlanta Georgia
5. You have the highest override percentage
6. 100% Vested / Ownership
7. Designate a beneficiary on your code number
8. You can sell your code number
9. You can name your own start-up company (Team Name)
 - Pick 3 names and run it by your SMD/CEO
 - Make your own Brand (shirts, hats, jackets, etc)
 - Turn your team name into an S-Corp
10. You can build SMDs and get a 15-20% spread on each one
11. You can override EMDs & above (even if you're only SMD)
 - You will find the best person on your team after you hit SMD
12. You get unlimited exchange legs (give up 1 to get unlimited in the future)
13. Attend different leadership retreats and travel the world
14. Attend quarterly SMD meetings at the Pinnacle headquarters
15. Open your own office (multiple offices)
16. SMD position is a permanent position
17. You have prestige and bragging rights (You are part of the 1%)
18. You have better associations
19. You have credibility with the WFG platform
20. You control the standards and promotions on your team
21. Every recruit on your team stays on your team
22. You get to run your own Baseshop (Trips, contests, BBQs, etc)
23. You get to make a name for yourself
24. SMDs make this their LIFETIME career
25. You now have access to the Quarterly Baseshop Bonus Pool
 - 50,000 points 3 months in a row = \$8,000
 - 100,000 3 months in a row = \$16,000

15 Great Books for Success

“Reading is essential for those who seek to rise above the ordinary.”

– Jim Rohn



- | | |
|-----------------------------------|------------------------------|
| 1. Retirement Miracle | 9. The Financial Pocketknife |
| 2. Tax-Free Retirement | 10. #MAXOUT Your Life |
| 3. Power of Zero | 11. Leadership Journey 1 |
| 4. Stress-Free Retirement | 12. Leadership Journey 2 |
| 5. Money, Wealth & Life Insurance | 13. The Truth About WFG |
| 6. Volatility Shield | 14. Skill With People |
| 7. The Wealthy Physician | 15. Safe Money |
| 8. Look Before You LIRP | |

The System Checklist

Step 1: Interview

- Memorize your business code number
- Call & collect the top 3 business partners
- Schedule your personal financial orientation within 24-48 hours
- Attend the Crusade class

Step 2: Financial Orientation

- Complete the 7-Day Standard
- Complete your Personal Financial Review
- Set up 3 qualified appointments
- Attend the Orientation class

Step 3: Business Plan

- Get your Associate promotion
- Develop your prospect lists (4 top 25 lists)
- Schedule your Life exam
- Attend the Scripting class

Step 4: Start Up

- Learn the scripts
- Invite 10 guests to BPM/BMP
- Set up 10 qualified appointments

Step 5: Field Training

- Get your Life license and get appointed to 10 different companies
- Complete 10 qualified field training appointments
- Get certified by your SMD on the field training presentation

Step 6: Duplication

- Repeat steps 1-5 with all new associates
- Develop field trainers & elite trainers
- Earn your SMD promotion, and build & develop leaders

