



Orientation Packet

**A Step by Step Guide to Getting your Business and
Income off to a Fast Start!**

Important Info and Numbers

| | |
|--|---|
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| <p>Licensing Coordinator/Office Manager Julie Martinson</p> | <p>262-789-7767 Office <i>All Licensing Questions</i> <i>All Pending Business, Paper, Process & Client Issues</i> Personal Email: jmartinsonpfs@gmail.com Business Email: jmartinson.f8222@primerica.com</p> |



**LIFE LINE
CALL US!**
We are here to help you!



**Red Light/Green Light
STOP...**
When issues come up!



Keeper of the Keys
**When you come to locked
doors...We have the Keys!**

Tenacious Headquarters: 330 S. Executive Dr, Suite 305, Brookfield, WI 53005

Primerica REP HELPLINE: 770-381-1000

Regional Licensing (RLC): 470-564-6371

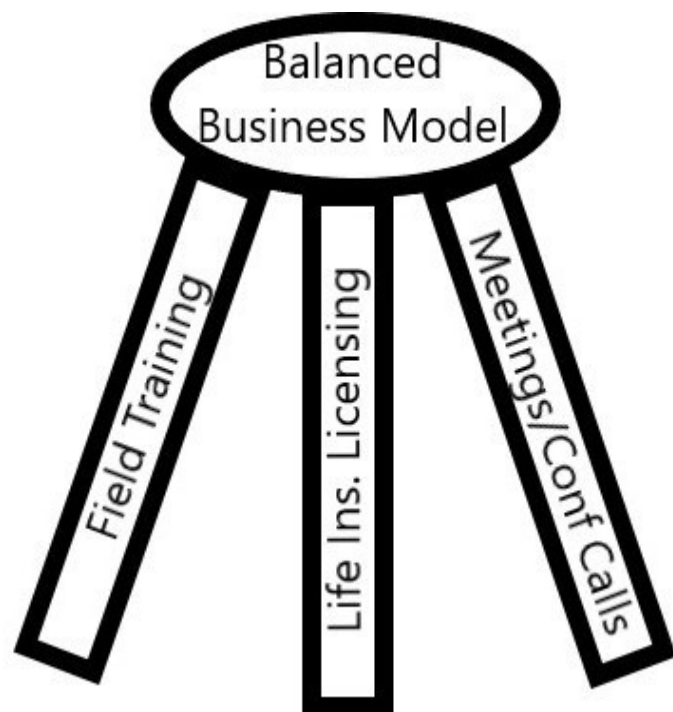
IMPORTANT! Team Tenacious Regular Meetings & Zoom Conference Call SCHEDULE

(EXACT DATES, TIMES, DIAL & LOGIN INFO FOUND on TT Google Calendar)

| | | | |
|-----------|---|--------------|-------------------|
| Sunday | TT (ENTIRE TEAM) Conference Call – 8:30pm – 9pm <i>1x MONTHLY – EVERYONE-(ALL REPS & PARTNERS)</i> | Everyone | |
| Monday | "The TT Future" Conference Call – 8:00am – 8:15am <i>1x WEEKLY</i> | "TT Future" | |
| Monday | TT "ALL Serious" Meeting – 8:30am – 9:30am <i>1x WEEKLY</i> | TT "Serious" | Brookfield Office |
| Tuesday | TT "ALL Serious" Conference Call – 8:00am – 8:30am <i>Tuesday - Thursday</i> | TT "Serious" | |
| Tuesday | TT Money & Business Seminar & Training Mtg's 6:30pm – 7:30pm <i>1x WEEKLY- (Arrive at 6pm!)</i> | Everyone | Brookfield Office |
| Wednesday | TT "ALL Serious" Conference Call – 8:00am – 8:30am <i>Tuesday - Thursday</i> | TT "Serious" | |
| Thursday | TT "ALL Serious" Conference Call – 8:00am – 8:30am <i>Tuesday - Thursday</i> | TT "Serious" | |
| Friday | TT "Leadership with Maxwell" Class – 8:30am – 10:00am | Everyone | Brookfield Office |
| Saturday | TT Super Saturday & Recognition – 8:30am – Noon <i>1x Monthly (generally 1st Saturday of Every Month)</i> | Everyone | Brookfield Office |

What's NEXT?

“The QUESTION that ALL WINNERS ask!”



**ACCOMPLISHED IN 5-8
HOURS/WEEK!**

**Field Training = “On the Job”
Training**

**Life Insurance Licensing =
Attend PFSU + Pass Test**

**Meetings/ Conference Calls =
Team Building!**

OUR SIMPLE 4 POINT GAMEPLAN TO BUSINESS OWNERSHIP!

1. **RECRUITING** is the # 1 focus!
2. **EVERYONE** goes to the Money and Business Seminar!
3. **EVERYONE** does their OWN FNA! *(with help from trainer!)*
4. **SPRINT** New Associates to DISTRICT!

Earn your **FIELD TRAINING BONUS**, get trained, and learn our Unlimited Referral System!

Earn While You Learn With The Field Training Bonus

| BUILD | HELP | LEARN | EARN | SPRINT |
|--------------------------------------|---|---|--|--|
| Build a team and grow your business. | Help families across the kitchen table. | Learn the business and get life licensed. | Earn Field Training Bonuses. NO MAXIMUM* | Sprint to District Leader to kick start your future. |

Earn credits that can convert to an actual cash bonus while you learn:

- How Primerica's business works
- About Primerica's products and how we help clients with life insurance
- How to build your team
- The path to life insurance licensing success, as you earn your first promotion

</

How does it work?

- For the first 90 days AFTER you submit your IBA, for every "unit" of 1 recruit and \$1000 in Field Training Observation (FTO) premium you achieve, \$200 of FTB bonus credits will be "banked"
- To receive FTO credit, you must be present and observe the sales process
- To remain at the \$200 per 1 recruit x \$1000 amount, you must complete pre-licensing in your first 60 days. If you do not, the banked amount reduces to \$100 per 1 recruit and \$1000
- The banked amount is paid out when your life license is issued within 90 days of your IBA date

How We Get Paid

EXAMPLE: \$300,000 life application

\$83.33 monthly premium x 12 months = \$1000 yearly premium (BP)

| REP | SR REP | SPRINT to DISTRICT | DIV | RL | RVP |
|------------|---|---|------------|------------|-------------|
| 25% | 35% | 50% | 60% | 70% | 110% |
| \$250.00 | \$350.00 | \$500.00 | \$600.00 | \$700.00 | \$1,100.00 |
| | <u>In 1st 30 Days</u> 1 New Agent & 1 New Client And Go to PFSU Class (Master Copy) YOU GET <u>PROMOTED</u> ! | <u>In 1st 30 Days</u> 3 New Agents & 3 New Clients (Total) And Go to PFSU Class (Master Copy) YOU GET <u>PROMOTED</u> & EARN <u>50%</u> ! | | | |

This is a simplified example of Primerica Term Life of \$1,000. Annual Bonusable Premium (\$83.33/mo)

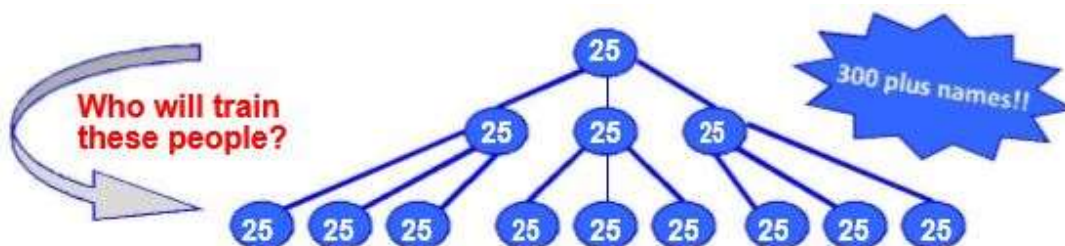
For ACTUAL current compensation on ALL Primerica Life Policies and all other products, see POL "Compensation" Tab!

OVERRIDES are created by the "spread" in contracts (Passive Income) = AWESOME!!

In your 1st 30 Days ONLY... You have the ability to earn 2 Pay Level Increases!

By the way... the "Client" can be YOU! (Master Copy)

Marketing Plan: Combine the EXPERTISE of Trainer with CREDIBILITY and COACHABILITY of Trainee!



Goal: For YOU to become the trainer; for you to combine your expertise with the credibility of a new recruit.

Can you see, that if you master RECRUITING, TRAINING others, and getting REFERRALS – that you will have UNLIMITED amounts of places to go, thus be able to earn UNLIMITED amounts of money?

Sprint to District

District Leader Promotion = 50% Contract/ Field Training Bonus!

To "Sprint to District"... you must have:

3 Direct Recruits in 1st 30 Days
3 Life Training Sales in 1st 30 Days

To EARN full Field Training Bonus... you must:

COMPLETE PFSU/UCANPASS in 1st 60 Days
Get LIFE LICENSED in 1st 90 Days

**There are 2 Ways to WORK Primerica:
You Choose!**

SLOW TRACK

Getting Licensed first:

Study for test, get licensed

You Start With:

No Team
Limited Market
No referrals
No Training

Rep Contract 25%

Since you aren't trained you have to take a trainer along with you. So you split the sale.
Half of 25% is 12.5%

The average life app is
\$83mo x12 = \$1,000yr
12.5% is \$125

3 sales is about \$375. your 1st month licensed.

Total Value: \$375

FAST TRACK

Sprinting to District:

10-15 KT Appt's - 1st 30 days

You Start With:

Team of 3-6 people
Unlimited Market
Referrals
You're Trained

District Contract 50%

You now have 3-6 teammates to train who will also want to Sprint to District
You know what you are doing and don't need to split sales.

The average life app is \$83mo x12 =
\$1,000yr - 50% is \$500

3 sales is about \$1,500 your 1st month & UNLIMITED field training bonus!

Total Value: \$1,800+

TEAM TENACIOUS PROMOTION GUIDELINES

****Must be ACTIVE & Attendance to meetings/trainings is REQUIRED for all promotions**

All Agents MUST Witness THREE Life Training Sales Before Going Solo

REGIONAL VICE PRESIDENT

110%

- ✓ 20 **New** Team Recruits, 2 Months in a Row
- ✓ \$20,000 Team Premium, 2 Months in a Row
- ✓ Principal Series 26 Licensed
- ✓ Ownership Exchange* (Replacement Leg(s))
- ✓ 1 Regional Leader + 5 Other Districts, 30 Licensed Agents
- ✓ 72% QBI or Above

REGIONAL LEADER

70%

- ✓ 7 **New** Team Recruits
- ✓ \$7,500 Team BP in 1 Month
- ✓ Series 6 & 63 Licensed
- ✓ 3 Direct Districts OR 1 Direct Division + 1 District
- ✓ 5 Licensed Agents Total

DIVISION LEADER

60%

- ✓ 5 **New** Team Recruits
- ✓ \$5,000 Team BP in 1 Month
- ✓ Complete SIE + Submit U4 Electronically
- ✓ 1 Direct District
- ✓ 3 Licensed Agents Total (including yourself)

DISTRICT LEADER

50%

- ✓ 3 **Active** Direct Recruits (Cumulative)
- ✓ \$2,500 BP in 1 Month
- ✓ Life Licensed

SPRINT TO DISTRICT

- ✓ 1st 30 Days → 3 Direct Recruits + 3 **Field Training Observations**
- ✓ 1st 60 Days → Complete PFSU
- ✓ 1st 90 Days → Pass Life Exam

SENIOR REPRESENTATIVE

35%

- ✓ 1 Direct Recruit
- ✓ 1 Life Training Sale or **Field Training Observation** (*can be New Associate's personal*)
- ✓ Complete **Master Copy**

Not all families you approach will purchase the same "mix" of products. Your actual earnings will depend on the actual sales you make. You must do at least 1 direct recruit and \$1,500 in personal premium to advance to any other level. You may not use more than 50% of any one leg to trigger your promotion.

*Ownership exchange calls for you to leave behind people to take your place when you leave. The RVP has a choice of 1 Regional Leader, or 2 Division Leaders, and ultimately the discretion to promote and name the proper replacement. You must average \$10,000 in team premium outside of the replacement leg, of which your production can only count for half, and have 20 total life licensed agents after replacement; you must do at least 2 direct recruits and \$4,000 personal premium in each of the 2 months.

**Active means yourself and associates under you, engaged in regular pursuit of licensing and field training!

Revised 5/10/2019

The RIGHT Market

Working in the **RIGHT** market is **critical** to your success. If you work in the right market, you **WILL** make money and build a solid business.

If you work in the **WRONG** market, you can work long hours and **NEVER** make any money.

TARGET MARKET

1. Married (Living with Spouse)
2. Age (25-55)
3. Children (Living at Home)
4. Homeowners (Renters)
5. Occupation (Full time job earning \$30,000+)

*Bonus = Lived in the area for 2 years or longer!

PRIME TIME

for Kitchen Tables (KT's)

5:30, 7:45 and 9:00pm

OR

6:00pm and 8:00pm

Follow the time slots above for the best results in having a consistent schedule that is also duplicatable!

RULES

for Kitchen Tables (KT's)

1. Husband & Wife BOTH at KT's
2. 3 Appointments per Week
3. At least 2 in a row (Max time)
4. 4 – 5 Pointers in Evenings
5. Let Trainer know 24 – 48 hrs in advance

***Additional** appointments are considered 1 of 4 below:

- a. Interview
- b. Coffee
- c. Lunch
- d. Money & Business Seminars

Goal: To have an **UNLIMITED** amount of Warm Market appointments!

We average
7-20 referrals per
appointment



*Expand your market
thru **REFERRALS** and
RECRUITING*

25 name list → top 10 = 70 referrals ...where you are seen as the expert!

Setting Appointments

REMEMBER! *The key to appointment setting is to ask the right questions and remain in control of the conversation!*

Mechanics of Setting an Appointment:

1. **Introduction** – Small Talk 10-15 seconds
2. **Linker** – The reason I am calling is,..
3. **Body** – The message
4. **POST CLOSE**

Call picks up...

(INTRODUCTION) (SMALL TALK)

Hey _____ what's up? It's _____ from _____ (church) ... How are you?
... Awesome good, good, good... How's the family?... and everybody is good?
...Awesome!

(LINKER)

Hey listen...the reason I'm calling...I'm not sure if I mentioned this to you or not
the last time we talked, but I've actually gotten some financial licensing ...and
listen...

(BODY)

I just wanted to set a time to pop by and show you guys what I'm doing and if
you or somebody you guys know in the future could use what I do...I'd just love
for you guys to know enough that you'd feel comfortable referring us, so . . .
listen, as far as us getting together, what's better for you guys weekends,
weekdays . . .???

...Ask for Appointment

| Weekdays | or | Weekends | Which would be better? |
|---|----|--|------------------------|
| Early in the week or later in the week? | | Saturday or Sunday? | Which would be better? |
| Early - Mon. or Wed.? Later - Thurs or Fri.? | | Afternoon or Evening? | Which would be better? |
| Early around 6:00 or Later around 8:00? | | Early around 2:00 or Later around 4:00? | Which would be better? |

A Few more Tips...

*Only give a choice of two (2) appointment times.

*Use "pencil in" approach to avoid put-off.

*Know the answer to their possible Objections

*Your job is to set a **definite** appointment time **NOT** to sell over the phone!

Post-Close

POST CLOSE SCRIPT... (VERY IMPORTANT!)

...I'm gonna put you down for _____ on _____ ...talk to _____, if that doesn't work, call me back please like tonight or tomorrow at the latest with a couple of times that would work. OK?

Otherwise we'll plan on doing _____ at _____ o'clock, OK?

Listen ...Hey _____ please don't text me or email me if it doesn't work...sometimes I don't get them & I don't want to end up showing up at your house & you've been trying to tell me It didn't work...so I need you to call me ...and just don't call me and say it DOESN'T work...I need you call me with a couple of times that DO work...

...otherwise we will plan on _____ at _____ o'clock...OK? Is that all right? Very good...

(SMILE...a little humor) ...So listen ...I've got you at _____ on _____ and unless you or I die between now & then I'll see then ... OK? Very good ...

Recruiting Text Message

Recruiting Tips:

- Non-Qualified prospects might make good teammates, but not great clients. Your trainer will guide you through this process.
- 2 STAR or LESS... Not married, no kids, not homeowner, no job...

Send out this text message to people you would like to recruit.

- Hey (Name)! I just started working for a financial firm in _____, They are paying for my licenses and training and are expanding to hire more agents part time. Not sure if you are keeping your options open but I think you would be good for this. If you're interested, I could possibly have the manager set up a time to meet with you at the office.

**Once interested- please 3- way your potential teammate into a text message with your trainer that reads like this:*

- Hey (Name), I put you in a group message with (trainer's name), the manager for the financial firm. This way you guys can set up a time for him/her to give you a call.

What NOT to say!

When asked "What is it all about?"

(Information & these words and phrases do NOT work)

Life Insurance

Recruiting

\$99/25 to start

THESE ALL LEAD TO... "I'M NOT INTERESTED"

Give everyone a chance to see the business without jumping to their own conclusions!

Have your trainer help you answer tough questions!

Common Objections

Always listen to the “Handling Objections” Audio by Ian Prukner 1st! You will avoid massive mistakes that are made by many in this area!

| | |
|---|---|
| I need to talk to my spouse 1st | <p>Say Hey...you know what... I really, really appreciate you bringing that up because I definitely do want (her/him) to be there ...but listen... just generally speaking OK...just generally, if you had to pick a time that was generally better for the both of you would it be weekend's or weekdays?... just generally speaking?</p> <p>And then they're going to pick... (<i>"weekend's or week days which would be better?"</i>)</p> |
| What's the name of the company? | <p>Thank you so much for asking...it is a company called Primerica Financial Services. I'm sure you've heard of us...SO...as far as us getting together, what's better for you guys? (<i>weekends or week days which would work better?</i>)</p> |
| What is it? or What's it about? | <p>_____, thank you so much for asking that question... basically we're helping people to save money on debt, save money on taxes, save money on insurance and teach them how to take some that savings and actually save it for things like retirement, kids' college education, starting a business... it's really, really, pretty incredible...SO... as far as us getting together, what's better for you guys? (<i>weekends or week days which would work better?</i>)</p> |
| Too Busy or I don't have time right now or Can you call back another time? | <p>_____, thank you for bringing that up... I know how busy you are, and you know when people say that, what they are really saying to me is they think I'm gonna come by and waste their time trying to sell who knows what... Is that kind of how you feel? (WFA) Hey listen _____, I don't wanna waste YOUR time and I definitely don't wanna waste MY time... give me 15 minutes and if in 15 minutes what I'm showing you is not unbelievably interesting to you, let me know and I'll stop and we'll never talk about it again...is that fair?... OK ...great...SO...as far as us getting together... what's better for you guys? (<i>weekends or week days which would work better?</i>)</p> |

Common Objections

Always listen to the “Handling Objections” Audio by Ian Prukner 1st! You will avoid massive mistakes that are made by many in this area!

I already have a Financial Advisor

(I've had someone before the one I have now)

IMPORTANT! If they already have a Financial Advisor and that advisor is not with Primerica, they're getting taken advantage of... 100%...that's a certainty...That's exactly who you want to see, but you have to be on your A game...so here is how you handle that...

There are 2 diversions of this...So here is the logic...

I say ...man ____ that is AWESOME... very, very good, you are way ahead of most people... ____, Let me ask you a question, if that's OK...Out of curiosity, is this your 1st Financial Advisor or have you had somebody before?

(This is where we're going to divert... they're either going to say "it's my first" or they're going to say "I've had somebody before")

I've had somebody before...

Awesome great so... why did you make a switch, if you don't mind me asking, from where you were, to the person you have now?

(And they're going to say some version of...There was an improvement like..."I liked them better, they had a better product, lower fees"... Some sort of an improvement.)

...Listen, sounds like you found an improvement (correct me if I'm wrong) You took advantage of that improvement & made the switch... right? Awesome...so let me ask you another question if I can... so you found improvement, you made them prove it is it at least within the realm of possibility that there may yet again be another improvement that could be made...It's at least possible right, that there could be something even better right? OK...so you seem like somebody that likes to get all the information, that likes to make informed decisions, right?... and even acts on stuff when you find things are better right? OK... let me get you some of that information OK?... if there's an improvement, at least you know, right?... OK...and If there's not then you know you're doing everything 100% right and that person's doing great job... either way YOU WIN, right?... OK, more information definitely couldn't hurt you, so as far as getting together, what's better for you guys?

(weekends or week days which would work better?)

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I say ...man ____ that is AWESOME... very, very good, you are way ahead of most people... ____, Let me ask you a question, if that's OK...Out of curiosity, is this your 1st Financial Advisor or have you had somebody before?

(This is where we're going to divert... they're either going to say "it's my first" or they're going to say "I've had somebody before")

No...This my 1st Financial Advisor...

Awesome great...it sounds like you're probably pretty happy with them...OK great...AWESOME...so let me ask you a question _____. If you walked into the doctor's office tomorrow with arm pain...the doctor looked at you & he said, "____, listen I've got a solution. We are going to amputate...so listen...I've got the surgery room ready in the back, just go get washed up and put on the gown and in 30 minutes you'll have one arm. I promise you, the hurting arm will never hurt again for the rest your life... So just go ahead and go on back and let's get it done." Would you say, "Sure Doc, sounds good! I can't wait to have one arm!" or would you first go and get a second....(pause) opinion? *and I say...* of course you get a second opinion, right? So listen, I know it's not your arm... ONLY your entire financial future...right...no big deal... So wouldn't it make sense to get a second opinion on something as important as your financial future & your finances? ...of course it would. So, listen, let's get together...and get you some information, and the worst thing that happens is...maybe you're doing everything right and now you know that the opinion you've gotten is the right thing...and if you're not, I'm sure you'd at least want to know, right...whether you took action on that or not, is fine...but you'd at least want to know, right?...of course you would, so as far as getting together, what's better for you guys?

(weekends or week days which would work better?)

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I’m just NOT interested

_____ thank you so much for bringing that up...like I said you may not have any interest, but for sure somebody you know would benefit unbelievably from this ...so listen you may or may not be interested ...that's fine, give me 15 minutes, within 15 minutes if it's not interesting to you, we'll stop, we don't need to talk about anymore ...but I really want you to see this... if not for you for the people in your life you love and care about that are struggling financially right now ...OK so listen as far as us getting together what's generally better for the both of you would it be weekend's or weekdays

And then they're going to pick...
(*"weekend's or week days which would be better"?*)

Top 25 Training List

People you would want to help and would help you! Your Name: _____

| | Name | Phone Number | Market | | | | | Credibility | | | | | Market | Credibility | Total | |
|----|-----------|--------------|-----------|-----------|----------|------|----------|-------------|-------------|-------------|--------------|------------|--------|-------------|-------|--|
| | | | Married | Age 25-55 | Children | Home | Earn 30k | Known 1 yr | Spouse name | Home Invite | Visit 6 mos. | Helped You | | | | |
| 1 | | | | | | | | | | | | | | | | |
| | Comments: | | Activity: | | | | | | | | | | | | | |
| 2 | | | | | | | | | | | | | | | | |
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| 3 | | | | | | | | | | | | | | | | |
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| 9 | | | | | | | | | | | | | | | | |
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| 11 | | | | | | | | | | | | | | | | |
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| 13 | | | | | | | | | | | | | | | | |
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Top 25 Training List

People you would want to help and would help you! Your Name: _____

| Name | | Phone Number | | Market | | | | | Credibility | | | | | | | |
|------|-----------|--------------|-----------|---------|-----------|----------|------|----------|-------------|-------------|-------------|--------------|------------|--------|-------------|-------|
| | | | | Married | Age 25-55 | Children | Home | Earn 30k | Known 1 yr | Spouse name | Home Invite | Visit 6 mos. | Helped You | Market | Credibility | Total |
| 1 | | | | | | | | | | | | | | | | |
| | Comments: | | Activity: | | | | | | | | | | | | | |
| 2 | | | | | | | | | | | | | | | | |
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| 13 | | | | | | | | | | | | | | | | |
| | Comments: | | Activity: | | | | | | | | | | | | | |

S.T.E.A.M.

Another great way to create a prospect list is by using “S.T.E.A.M.”

Look at the following adjectives and write down who comes to mind.

| | | |
|------------------------|----|-------|
| Salesperson | 1 | TEL # |
| | 2 | TEL # |
| | 3 | TEL # |
| Teacher | 4 | TEL # |
| | 5 | TEL # |
| | 6 | TEL # |
| Enthusiastic | 7 | TEL # |
| | 8 | TEL # |
| | 9 | TEL # |
| Ambitious | 10 | TEL # |
| | 11 | TEL # |
| | 12 | TEL # |
| Money Motivated | 13 | TEL # |
| | 14 | TEL # |
| | 15 | TEL # |

Master Copy



Master
Copy

My Name:

I have completed my **PERSONAL FNA** that I am excited about!

Completion Date: _____

Field Trainer: _____

I have my **PRIMERICA LIFE Term Life** Protection Plan in place to protect my family's future Income!

Completion Date: _____

Field Trainer: _____

I have an **EMERGENCY FUND Plan in Place with PFS Investments** for my Financial Independence!

Completion Date: _____

Field Trainer: _____

I have an **IRA/ROTH Mutual Fund Plan in Place with PFS Investments** for my Financial Independence!

Completion Date: _____

Field Trainer: _____

I have **Debt & have a Debt ACCELERATION/ELIMINATION Plan INCLUDED in my FNA** for Financial Independence!

Completion Date: _____

Field Trainer: _____

I have **Auto/Home Protection Plan with Primerica Secure** or at least received a competitive Quote!

Completion Date: _____

Field Trainer: _____

*****OFFICE USE** – Submitted to Office for recognition on _____