



NEW AGENT ROADMAP

Welcome again to the Faction Financial team. This road map will HIGHLIGHT the steps needed to complete as a new agent. MAKE SURE TO COMPLETE EACH STEP IN FULL BEFORE MOVING TO THE NEXT

CHECKLIST

- ☐ **Pass Exam**
- ☐ **Fingerprints/Apply for license**
- ☐ **CRM Setup**
- ☐ **Meet The Team & Attend Trainings**
- ☐ **Get License Approval**
- ☐ **Welcome Call/Agent Agreement**
- ☐ **Submit Carrier Requests**
- ☐ **Receive Carrier Approvals**
- ☐ **Setup Portals**
- ☐ **Day 1 Training Video ✓**

Below are the details for completing each step. These are the same details outlined in the email sent to you by Teagan

1: GET LICENSED

Skip to number 2 if you are already licensed

- ☐ EXAM PASSED: Congratulations!!
- ☐ FINGERPRINTING: Click [here](#), select your state, and follow the directions
- ☐ APPLY FOR YOUR LICENSE: Click [here](#)
 - Select resident
 - Select Go to the Online Application
 - Select Individual
 - Select Social Security Number (SSN)
 - Type in Last Name and SSN

- Select the box in front of “I accept.”
- Click Next
- Click Start
- Select Producer Licensing
- Select Initial
- Select Resident (home state)
- Select under Insurance Producer: Life **AND** Health (accident or Sickness)
- Click Next
- Click Purchase

Your license will take anywhere from 2-10 days to process. During that time, please complete the following IN ORDER. Do not move on to the next step until the step before is fully completed:

2: CRM SETUP

Faction Financial has our own internal CRM (Customer Relationship Management) that is built specifically for what we do.

The process of getting you set up with an A2P verified phone number so that you can call and text out of your CRM is tedious. PLEASE follow the directions to a “T”

- ☐ Get a business card from Hailey: (815) 441-9145
 - You will need one for CRM setup
 - Text Hailey (Faction’s VA), and she will get you set up with one
- ☐ SETUP FORM: Click [here](#) to fill out the setup form for your own CRM
 - This takes 1-2 weeks to be set up.
 - Get this completed so that it is ready by the time you are licensed

IMPORTANT NOTE: If you have an LLC **ALREADY** set up, make sure that you have the incorporation documents before using it to fill out your CRM Setup.

SOLE PROP SETUP: If you do not have an LLC, you will need to set up as a sole proprietor. You will need to request an EIN as a sole proprietor from the IRS [HERE](#)

Wade is our CRM expert. If he reaches out to you during setup, please get back to him ASAP with any needed info. His number is: (412) 401-5016

****AFTER YOU GET ACCESS TO CRM****

SETUP: Once you get access to the CRM, you will need to set up a few minor things, such as connecting your calendar and setting up your wallet. There is a video that will walk you through everything [here](#)

CRM TRAINING FOLDER: There are more supplemental videos that show you how to import leads, do automations, set tasks, etc... In your CRM menu on the left-hand side, towards the bottom, you will see “CRM Training Folder”

3: MEET THE TEAM & ATTEND TRAININGS

- ☐ GET ON ZOOM: Meet the team
 - Here is our Agent Website: Factionteam.com
 - The link to our Zoom is at the top, “Zoom Office”
 - Password is in subtext: “FFG2025”
 - Faction is in breakout room 30
 - 8 am - 8 pm Daily
 - Zoom is our virtual office. If you are working, you’re on Zoom
 - The agent website is the home for all agent resources
- ☐ TRAININGS
 - Training schedule is below and can also be found on Factionteam.com
 - Click “Founders Trainings” button on the website to access the Training Zoom
 - Training schedule is found below
 - To be successful in this industry, these are a must (Add these to your calendar)

WEEKLY TRAININGS	
<div>Monday</div> <div>WEEKLY KICK OFF CALL 8 AM PST / 11 AM EST link: FFGTrainings.com Passcode: FFG2025</div>	<div>Wednesday</div> <div>FOUNDERS TABLE LEADERSHIP CALL 8 AM PST / 11 AM EST link: FFGTrainings.com Passcode: FFG2025</div>
<div>Friday</div> <div>MINDSET w/ Jeff Combs 8 AM PST / 11 AM EST link: FFGTrainings.com Passcode: FFG2025</div>	<div>Everyday (Mon-Sat)</div> <div>NEW AGENT 11:30 AM PST / 2:30PM EST link: FFGdials.com Passcode: FFG2025 breakout room: 17</div>

IMPORTANT: Once you have completed all the steps above, you will be waiting for your license to be approved by the state. During this time, you should hop on Zoom every chance you get to start shadowing, studying the script, and role-playing. -> Factionteam.com

HOLD HERE UNTIL YOU GET YOUR LICENSE/NPN NUMBER FROM STATE

4. LICENSE APPROVAL

- ☐ Text Teagan in your onboarding group chat that your license was approved

- Send her your NPN, which you can find [here](#)
- ☐ Fill out the onboarding form via Monday
 - Teagan will provide you with the details that you will put into the form
 - Upline & Comp

5. AGENT AGREEMENT & WELCOME CALL

- ☐ You will receive an email from “Septembrie Sweeney” via PandaDoc
 - This is your agent agreement. Sign ASAP, it will expire in 48 hours
- ☐ Amanda (Founders Onboarding) will call you
 - Phone Number: (480) 253-9133

6. SUBMIT CARRIER REQUESTS

Now that you are licensed, you will reach out to Teagan to start onboarding and submitting requests to get carriers.

- ☐ Receive email from Founders to register for SURE LC
 - Sure LC is a software that allows you to submit multiple carrier requests quickly
- ☐ Request the following carriers in SURELC
 - Click “Requests” → “Click + Sign” → “Create Carrier Request”
 - Contracting FAQ, click [here](#)
 - Request available carriers, **EXCEPT** for F&G, American Amicable, & TransAmerica (do not request those three carriers as they will be discarded).
 - UHL and ELCO are not in SURELC. Text Teagan to request these

After these carriers are requested in Founders SURELC, the IMO will process the carrier requests and send them off to the carrier.

AML TRAINING: Ensure to complete the FREE AML Training through SureLC (SuranceBay)

7. SETUP PORTALS

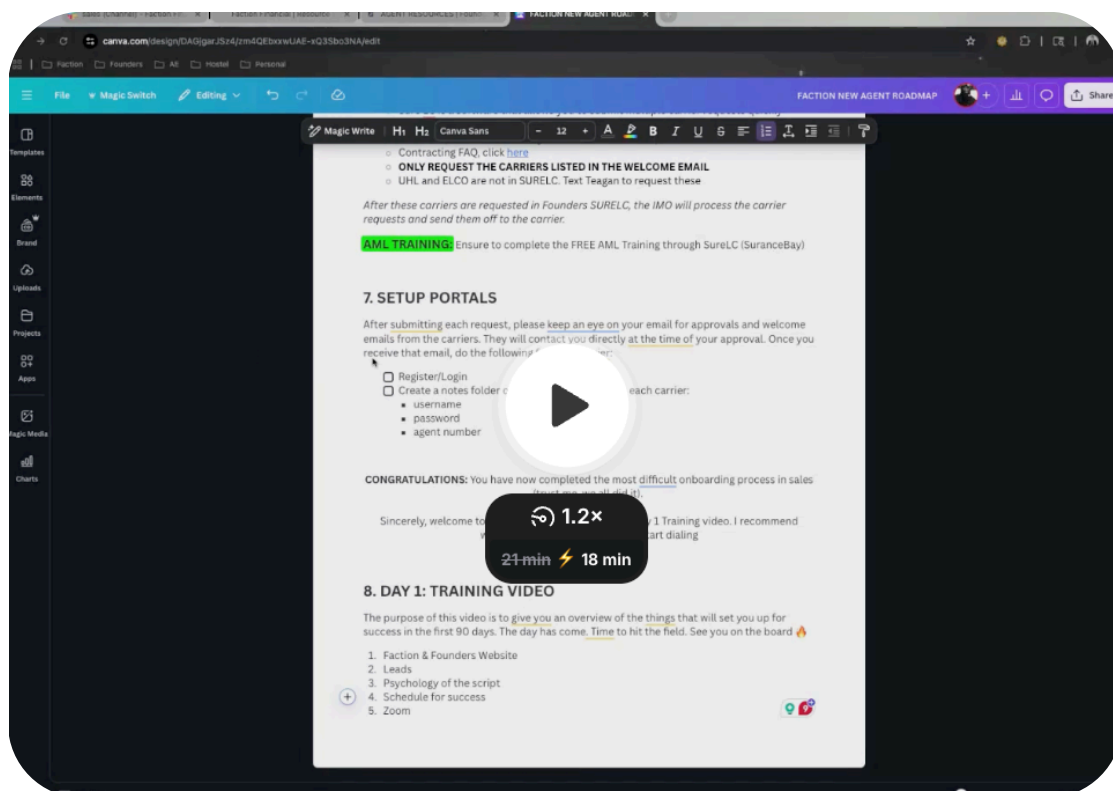
After submitting each request, please keep an eye on your email for approvals and welcome emails from the carriers. They will contact you directly at the time of your approval. Once you receive that email, do the following for each carrier:

- ☐ Register/Login
- ☐ Create a notes folder on your phone to save for each carrier:
 - username
 - password
 - agent number

CONGRATULATIONS: You have now completed the most difficult onboarding process in sales (trust me, we all did it).

Sincerely, welcome to the team. The next step is the Day 1 Training video. I recommend watching this the day before you start dialing

8. DAY 1: TRAINING VIDEO



The purpose of this video is to give you an overview of the things that will set you up for success in the first 90 days. The day has come. Time to hit the field. See you on the board 🔥

CLICK [HERE](#)

1. Faction & Founders Website
2. Leads
3. Psychology of the script
4. Schedule for success
5. Zoom