

Fast Start Packet



A Transamerica Company



Take the first
steps toward
building the
business you've
always wanted.

Name: _____

Date Started: _____

Licensed Trainer: _____

Senior Marketing Director (SMD): _____

Top 25 Market List	Reviewed by:	_____	_____	_____	_____
		Initials	Print Name	Initials	Print Name
Field Training	Reviewed by:	_____	_____	_____	_____
		Initials	Print Name	Initials	Print Name
Guest (BPM/One-on-One)	Reviewed by:	_____	_____	_____	_____
		Initials	Print Name	Initials	Print Name
WFG Financial Needs Analysis	Reviewed by:	_____	_____	_____	_____
		Initials	Print Name	Initials	Print Name
Training Materials	Reviewed by:	_____	_____	_____	_____
		Initials	Print Name	Initials	Print Name

This agent is qualified to attend the Fast Start School on: _____

SMD Signature: _____

Part One

Steps 1 through 5 must be completed within 10 days to qualify for Fast Start Training. An agent cannot attend training without completing Part 1 of the Fast Start packet.

Step 1

Complete the Top 25 Target Market List

Date Completed: _____

Step 4

Complete your WFG Financial Needs Analysis*

Date Completed: _____

Step 2

Begin Field Training

Date Completed: _____

Step 5

**Obtain & Review Fast Start Training Material:
The WFG System Manual**

Date Completed: _____

Step 3

**Bring a Guest to a BPM or Have a One-on-One
Overview**

Date Completed: _____

* The WFG Financial Needs Analysis, developed by World Financial Group, is based on the accuracy and completeness of the data provided by the client. The analysis uses sources that are believed to be reliable and accurate, although they are not guaranteed. Discuss any legal, tax or financial matter with the appropriate professional. Neither the information presented nor any opinion expressed constitutes solicitation for the purchase or sale of any specific product or financial service. Due to regulatory constraints in Canada, the WFG Financial Needs Analysis tool should not be used with mutual fund clients/clients of WFG Securities Inc.



Step One

Complete Top 25 Target Market List

Executive Memory Jogger

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



Fast Start Worksheet

Name	
12345678	

Agent Name: _____	SMD: _____
Date Completed: _____	SMD Approval: _____

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

Profile: (1) 25+ Years Old (2) Married (3) Children (4) Home Owner (5) Solid Business Background (6) Income (7) Dissatisfied (8) Entrepreneurial



Top 25 Worksheet

Agent Name: _____

Date Completed: _____

SMD: _____

SMD Approval: _____

	First Name	Last Name	R/F/A ¹	Phone Number(s)	Profile ²	Hot Button ³	One on One	BPM	Comments
1					12345678				
2					12345678				
3					12345678				
4					12345678				
5					12345678				
6					12345678				
7					12345678				
8					12345678				
9					12345678				
10					12345678				
11					12345678				
12					12345678				
13					12345678				
14					12345678				
15					12345678				
16					12345678				
17					12345678				
18					12345678				
19					12345678				
20					12345678				
21					12345678				
22					12345678				
23					12345678				
24					12345678				
25					12345678				

1 (R) Relative (F) Friend (A) Acquaintance
2 Profile: (1) 25+ Years Old (2) Married (3) Children (4) Home Owner (5) Solid Business Background (6) Income (7) Dissatisfied (8) Entrepreneurial
3 Hot Button: The prospect's issues beyond his/her Profile, e.g. unemployed, protect family, etc.

Step Two

Begin Field Training

Go Out with a Qualified Trainer for Field Training

Participate in at least two Field Training sessions with a qualified trainer. Please remember to have your field trainer sign this form to verify the training was completed.

_____	_____	_____
Date	Project Name	Field Trainer Name & Signature
_____	_____	_____
Date	Project Name	Field Trainer Name & Signature
_____	_____	_____
Date	Project Name	Field Trainer Name & Signature
_____	_____	_____
Date	Project Name	Field Trainer Name & Signature
_____	_____	_____
Date	Project Name	Field Trainer Name & Signature
_____	_____	_____
Date	Project Name	Field Trainer Name & Signature

Step Three

Bring a Guest to a BPM

Guest Name

Phone Number

Guest Name

Phone Number

Guest Name

Phone Number



Step Four

Complete Your Financial Needs Analysis

Date _____

Client Name _____ DOB _____ ☐ Non-Smoker ☐ Smoker

Spouse Name _____ DOB _____ ☐ Non-Smoker ☐ Smoker

Address _____

Home Phone _____ Work Phone _____

Cell Phone _____ Email _____

Goals

Retirement _____ Home _____ LTC _____ Retire Parents _____

Education _____ Vacation _____ Travel _____ Other _____

Monthly Income

Combined Gross _____ Combined Net _____ Discretionary _____

Monthly Expense

Mortgage _____ Car Insurance _____

Car Payments _____ Life/Health Insurance _____

Utilities _____ Other Loans _____

Credit Cards _____ Car Maintenance/Gas _____

Food/Clothing _____ Personal Expenses _____

Property Insurance _____ Miscellaneous _____

Total Expenses _____

Step Four Cont.

Complete Your Financial Needs Analysis

Assets

Market Value of Home _____

Checking Account _____

Life Insurance Cash Value _____

Previous Year Tax Return _____

Mutual Funds/Stocks _____

Savings Account _____

Retirement Plan _____

Liabilities

Mortgage _____

Car Loan _____

Personal Loans _____

2nd Mortgage _____

Credit Cards _____

Other Loans _____

Other Mortgage Information

Purchase Price _____

Loan Rate _____

Fixed _____ Variable _____

Estimated FICO _____

Monthly Property Taxes _____

Outstanding Low Balances _____

Years Due _____

Term _____

Monthly Payment _____

Monthly Hazard Insurance _____

How much could you comfortably afford to set aside in a lump sum each month to reach your goals?

☐ \$200 ☐ \$300 ☐ \$400 ☐ Other: \$ _____

Follow-up Appointment Date: _____

Client Signature: _____

Step Five

Obtain & Review Fast Start Training Materials

Read this manual and bring it to Fast Start Training:*

- WFG System Manual

Refer to the following resources as you build your business:*

- System Builder by Xuan Nguyen
- WFG Basics Course in the Training Center

Additional books that WFG agents have found useful and motivating as they started their businesses include:

- “Think & Grow Rich” by Napoleon Hill
- “Rich Dad, Poor Dad” by Robert Kiyosaki, Sharon Lechter
- “The Cashflow Quadrant” by Robert Kiyosaki, Sharon Lechter
- “How to Win Friends & Influence People” by Dale Carnegie
- “The 21 Irrefutable Laws of Leadership” by John C. Maxwell
- “How I Raised Myself from Failure to Success in Selling” by Frank Bettger

* The printed materials listed above can be ordered in the United States through the WFG Store or in Canada through the Distribution Centre, which are accessible through MyWFG.com. Training modules are available in the Training Center accessed through MyWFG. There are also recordings of webinars, training and other videos on the WFG Talks page of MyWFG.



Part Two

You have 30 days following the date of Fast Start Training to complete Part 2.

Admission Packet

Part 2 will be issued during Fast Start Training

Submit Your Securities Registration Paperwork

(U4 in the United States)

(Register for LLQP in Canada)

Date Completed: _____

Fast Start Training Attendance Date: _____

Deadline Date: _____

Fast Start Packet Checklist

Cover Page - Approval Form

(circle one)

- | | | |
|--|-----|----|
| 1. Is the agent's name legible and spelled correctly? (The name displayed on the packet will be used on the Fast Start Certificate of Completion.) | Yes | No |
| 2. Are all lines on the cover page completed? | Yes | No |
| 3. Has the Approval Committee initialed and approved completion of your packet as being correct, accurate and neat? | Yes | No |
| 4. Did a Senior Marketing Director sign and approve the Fast Start Packet for admission? | Yes | No |

Challenge #1 - Approval Form

- | | | |
|---|-----|----|
| 1. Has Step 1 (Top 25 List) been completed? | Yes | No |
| 2. Has Step 2 (Field Training) been started? | Yes | No |
| 3. Has Step 3 (BPM/One-On-One) been completed? | Yes | No |
| 4. Has Step 4 (WFG Financial Needs Analysis) been completed? | Yes | No |
| 5. Has Step 5 (Fast Start Training Materials) been completed? | Yes | No |

Fast Start - Worksheet

- | | | |
|---|-----|----|
| 1. Do you have names on the list? If yes, How many? _____
(Use the Executive Memory Jogger worksheet.) | Yes | No |
| 2. Do you have first and last names? | Yes | No |
| 3. Does each name have all applicable profiles circled? | Yes | No |
| 4. Are names and circled numbers clear and easy to read? | Yes | No |

Top 25 Worksheet

- | | | |
|--|-----|----|
| 1. Were all names on this list taken from the Fast Start Worksheet?
(Names and numbers must be clear and easy to read.) | Yes | No |
| 2. Do you have the required 25 names on this list? | Yes | No |
| 3. Does each name have all applicable profiles circled? | Yes | No |
| 4. Is there either a home/mobile or office phone number for each name? | Yes | No |

BPM/One-on-One - Worksheet/Approval Form

- | | | |
|--|-----|----|
| 1. Is the new agent general information complete? | Yes | No |
| 2. Is the new agent matched up with a qualified Field Trainer? | Yes | No |

WFG Financial Needs Analysis - Worksheet

- | | | |
|--|-----|----|
| 1. Has the agent completed the WFG Financial Needs Analysis? | Yes | No |
|--|-----|----|

Challenge #2 - Approval Form

- | | | |
|--|-----|----|
| 1. Did you understand that Step #2 will be issued during the Fast Start class? | Yes | No |
|--|-----|----|

Note: If there are "no" answers to any of the above questions, the entire packet will be rejected and your attendance to the Fast Start Training will be denied. If the packet was rejected, you have until 5pm on the Friday before Fast Start Training to submit the corrected packet for approval by the committee.

