Meeting Intro

Thanks for watching the video and meeting back up with me.

The purpose of our meeting is for me to learn a little more about you, get you some more information, and see if this could be a good fit.

Before I start if you could tell me a little bit about you and your background that would be great!

(Where do you live? What do you do now? How about your spouse? Do you guys have kids? )

* *Try to make connections, share your story*

I know that you watched the video and I saw that you picked path \_\_\_ . What did you like best about what you saw/what interested you most?

Display on Screen and Go over 2 Paths Slide

There are a couple of ways people can work with us:

1. **Refer:** For people who maybe don’t have a lot of time, or don’t want to be client facing, but still want to be involved and make extra money. They connect us with people who need our services and for each successful referral can earn anywhere from $40-$200. If doing this consistently they may earn $300-$500/month.

Where I see you is more on the right side here:

1. **Coach/Leadership Path:** Get a financial education through our training classes (on Zoom), get the licenses to help clients with their financial game plans. Having these licenses puts someone in a position to earn $2-3k/month part time, or as they get promoted to a higher contract level/build a team $5-6k full time. They also can grow into the RVP role they talked about in the video. There is potential for a 6 figure income there, and also an ownership opportunity.

Based on what you’ve seen so far which of these 2 paths do you think would be the best fit for you?

How much time do you think you can commit to this business? If working f/t job: could you devote a couple hours a few nights a week, or maybe some time on the weekends?

Closing

Great. So tell me why you think you’d be good at this, and why you’d be a good addition to our team.

I think you could do really well here. With your (people skills, communication skills, desire to help others…) you would be a great addition and we would love to have you on the team!

To get you started we need to fill out your application so we can get you in the system. It only takes about 10 minutes to complete. So let me pull that up and we’ll get you started!

**Do IBA, POL Registration/Primerica App, Get 10 References, Set next meeting (personal FNA) in next 24-48 hrs, next training (Fast Start, Referral Rep, Biz Overview)**

**Their Homework:** Text references, watch The Orientation with Jeff Seagraves