

GETTING STARTED WITH



GAMEPLAN FOR GREATNESS

“The road to success is not a mystery; it is the result of a deliberate, intelligent plan inspired by the desire to reach a goal.”



**TOTAL COMMITMENT
IS THE FIRST STEP
TO GREATNESS**

POLLARD NATIONAL NETWORK

**4901 Dickens Road; Suite #103,
Wilton Park 1**

RICHMOND, VA 23230

(804) 730-1900 · Fax (877) 436-9324

For Your Biggest Dreams to Come True YOU Must Have a PLAN!!!

NOTES

GAMEPLAN FOR GREATNESS

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**GETTING
STARTED**

FUNDAMENTAL UNDERSTANDING OF PFS

Recruit Name _____ Field Trainer _____
(c) _____
(h) _____

- | | (Read and Initial) | (Initials) |
|------------------|--|------------|
| KEYS: | REALIZE That you don't know anything about our business and therefore you must become a student of the business. | _____ |
| | BE COACHABLE: Follow directions, do what your manager says when he/she says it, do what your manager asks, when he/she asks it. Understand that they will stop when you stop. | _____ |
| | STUMBLE FORWARD: You learn from failure. Get back up when you fall. Experience is the teacher. | _____ |
| | TREAT IT LIKE A BUSINESS: Treat this with the respect it deserves. Study hard and practice, practice, practice. Think quality! | _____ |
| | COMMUNICATE WITH YOUR MANAGER: Communication is your lifeblood. Passing information, encouragement attitude adjustment and motivation... without it you'll die. | _____ |
| SERIOUS: | This is a serious business and a serious company. If you have the ability and opportunity to change your financial future by earning \$100,000.00 a year, you should not take this lightly. | _____ |
| COURAGE: | Have the courage and the inner strength to do the things that scare you, to do the things that are uncomfortable. You must get "uncomfortable" before you get "comfortable." | _____ |
| TRAINING: | Build and schedule your week around the weekly training meetings. These meetings are more important to your success than a sale! | _____ |
| MARKET: | Don't waste valuable time. Time is something you can never Make up. Stay in the "market": married, children, age 25-45 and employed. There are exceptions, but they are few and far between. | _____ |
| SPOUSE: | Recruit your spouse by making him/her aware of what we do. Bring him/her to training and fast start schools. Let them see the potential of this opportunity. | _____ |
| RECRUIT: | Understand that all businesses, colleges, universities, The Army, Navy, Air Force, Marines, The NFL, NBA, MLB, all professional sports teams and leagues recruit. Recruiting is the life line of our business. | _____ |

TOTAL COMMITMENT IS THE FIRST STEP TO GREATNESS!

Columbus Pollard
National Sales Director

THE SUCCESS CYCLE

Your success will depend on your learning the Success Cycle, understanding it, using it yourself and teaching it to others.



- Most products require you to be licensed or certified to market them. Check with your trainer for details.
- You may not discuss products/services for which you are not licensed or certified.

Important note: Remember to always comply with Primerica's telephone solicitation policy. Rules on "Do Not Call" can be found in the Advertising handbook under the compliance tab on POL.

RACE TO THE BANK!

BACKGROUND CHECK FEE: \$124

RECRUIT NAME

FIELD TRAINER

SOLUTION NUMBER

IBA START DATE

The Field Training Bonus

FIELD TRAINING BONUS			
\$200 CREDIT FOR EVERY 1 RECRUIT X \$1,000 FIELD TRAINING OBSERVATION PREMIUM			
ACTIVITY	<div><div>+</div><div>LIFE LICENSE</div><div>=</div></div>	BONUS	CREDIT
1 X \$1,000		\$200	
3 X \$3,000		\$600	
5 X \$5,000		\$1,000	
10 X \$10,000		\$2,000	
15 X \$15,000		\$3,000	
20 X \$20,000		\$4,000	
25 X \$25,000		\$5,000	
30 X \$30,000		\$6000	
WHAT WILL YOUR BONUS BE?			

When You Pass The Test

GET OFF TO A FAST START

PHASE 1: 3 x 3 in 7 Days (You Watch Me Help You Do MINIMUM)

You watch me set appointments, Do PFC, get commitments, get referrals and close

- Get started and get active **IMMEDIATELY!**
- Earn the **bonus** monies (*new recruit must complete class and do 3x3 within their first 30 days*)
- Get Fast Tracked to District in 7 days and get scheduled for pre-licensing class.

PHASE 2: 15 – 45 DAYS (I Watch You) Keep Building, Keep Learning, Keep Earning...

- I'll watch and help you make adjustments as you do presentations (individual/group).
- You will learn the PFC SYSTEM/Theory of Decreasing Responsibility, policy delivery System, recruiting, setting appointments, handling referrals, Steaming, Linking, Rule of 72, Cash Flow Quadrant, Prospecting, Beneficiary/Emergency Contacts, Refrigerator A Refrigerator B, Goal Setting, Teamwork, How to handle objections & FEET.

PHASE 3: 45 - 90 DAYS

FAST TRACK TO SECURITIES LICENSING

- Pass SIE and Set Up Securities Profile
- Complete Fingerprint Process and Submit
U4









PHASE 4: 60 – 120 DAYS

FAST TRACK TO FIELD TRAINER







you will learn and Must Master PFC....

- | | |
|---------------------------------------|--|
| • How to Help New Recruit Set Appts | • Life App |
| • Qualifying List for New Recruit | • Auto & Home |
| • Giving Winning Presentation | • Sr. Health |
| • Rule of 72 | • IBA |
| • Three Types of Accounts | • Breakout Rooms |
| • Whole Life vs. TERM | • PIN/FIN/Close |
| • Funny Banking | • Commitments |
| • Theory of Decreasing Responsibility | • Beneficiary/Emergency Contacts |
| • Refrigerator A Refrigerator B | • Referrals: STEAM/Linking/Happy Clients |
| • Setting Appointments | • Overcoming Objections |
| • FIPs (Group Presentations)/Zoom | • Attitude is Everything |
| • Inviting to Meeting | • Attendance |
| • Client Survey | • Communication |
| • Primerica App | • Technology |
| • Debt Stacking | • Cash Flow Quadrant |
| • Facebook Prospecting | • 8 5 3 1 |
| • PLPP | • Goal Setting/FEET/Please Tell Me No |
| • VIVINT | • Teamwork |
| • Promotions | |

PROMOTION GUIDELINES

<p>Representative 25% Contract </p> <hr/> <p>Promote Me to Senior Representative 35% Contract </p> <hr/> <p>Promote Me to District Leader 50% Contract  </p>	<p><i>1st Month – money submitted</i></p> <p>Promote Me to Division Leader 60% Contract  </p> <p>Produce 3 Licensed People (Team) \$5,000 Premium in 1 Month Submit U4 Package</p>
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Promote Me to Regional Leader 70% Contract















Produce 5 Licensed People (Team)
\$7500 Premium in 1 Month
Pass SIE, Securities Series 6, 63 & 26

Promote Me to Regional Vice President

18 - 24 Months in Business - Max

110% Contract + 20% BONUS + \$15,000 in PRI Stock
Average Income \$125,000 per year

Produce 10 Licensed People (Team)
\$15,000 Premium 1st Month / \$15,000 Premium 2nd Month
Do Promotion Exchange: promoting RVP's choice
(1 Regional Leader, 2 Division Leaders, or 3 District Leaders)
Be able to do \$10,000 in Premium after Promotion Exchange

Products & Services

Life Insurance \$83 Month PAC (\$1000)	Auto & Home	Variable Annuity (\$100,000) X 6.5% = \$6500	PFS Investments (\$10,000) X 5% = \$500	Primerica Legal Protection \$38 Start/\$28 mo (\$336 first year)	VIVINT	ID Theft Defense \$22 start/\$22 per month	Senior Health
--	-------------	--	---	--	--------	--	------------------

LEVEL	Rate	Comp	Auto	Home	Rate	Comp	Rate	Comp	Comp	Comp	Comp	Comp
REP	25%	\$250	\$100	\$95	16.50%	\$1,073	30%	\$150	\$50	\$200	\$39.20	\$150
SRP	35%	\$350	\$102.50	\$97	18.60%	\$1,209	32.50%	\$162.50	\$60	\$250	\$47.04	\$158
DIS	50%	\$500	\$105	\$99	21.75	\$1,414	35%	\$175	\$80	\$250	\$62.72	\$173
DIV	60%	\$600	\$107.50	\$101	27%	\$1,755	37.50%	\$187.50	\$90	\$250	\$70.56	\$181
REG	70%	\$700	\$110	\$103	38%	\$2,470	42.50%	\$213	\$100	\$250	\$78.40	\$206
RVP	110%	\$1,100	\$135	\$112.50	57%	\$3,705	62%	\$310	\$125	\$350	\$98	\$292

FOR PFA USE ONLY, NOT TO BE USED WITH THE PUBLIC

The Ultimate Business Support System

At Primerica, we provide a step-by-step guide to success to help you build your Primerica business. You are in business FOR yourself but not BY yourself. When you pay your \$99 to complete your Independent Business Application (IBA) fee **plus \$25 a month² for The Ultimate Business Support System**, you'll have access to everything you need to succeed. The Primerica App and Primerica Online (POL) let you do business in real time from your desktop, laptop, tablet, or smartphone.

Get access to cell phone discounts up to 25%.¹

FULL SERVICE POL SUBSCRIPTION NOT REQUIRED.

WHAT YOU GET with The Ultimate Business Support System

Your Own Business Website

Grow your new business with a professional website.

With The Ultimate Business Support System, you are only moments away from your own professional business website with free hosting and your own @primerica.com email address.

Training Tools

Prepare to pass licensing exams and learn the business.

Using POL and the Primerica App is the best way to tap into Primerica's extensive online training resources. Prepare for and pass the life and securities licensing exams. Watch and learn the business from live programs, on-demand videos, weekly training programs, and more.

Business & Competition Reports

Keep track of your business and personal standings.

Business reports provide up-to-date snapshots of all your business transactions, so you can decide where to focus in order to grow big. Competition scoreboards allow you to see your position in company competitions and recognition.

Communication and Credibility Materials

Created just for you! Access to professionally produced and approved videos, audios, presentations, and brochures in various languages.

\$25 per month

vs.

\$430 per month

RETAIL VALUE⁵ of Products and Services

Your Own Website:

\$50/month

PRIMERICA



Bob Buisson

Senior National Sales Director
Commerce, CA
• Joined Primerica: 1989
• FPA Representative Registered
• Representative: Robert Buisson
• Securities: 1990 (Series 7, 6, 8)
• Life Insurance Representative (LIR)
• Company Registered Name: Robert Buisson

Access to Live and On-demand Online Training:

\$55/month

PassNow



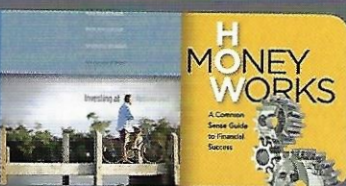
Business & Competition Reports:

\$75/month



Communication and Credibility Materials

\$250/month



ADDITIONAL VALUE ONCE SECURITIES LICENSED

Savings on Securities Licensing Fees³

Let Primerica help you with that.

Securities licensing fees can become expensive, but you can position yourself to get your licensing fees pre-paid with your full-service POL subscription.⁴

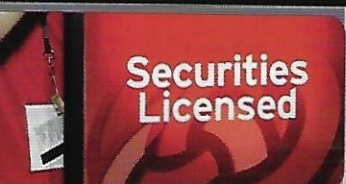
Morningstar Financial Analysis⁴

Get access to Morningstar financial analysis software.

Industry leading Morningstar output reports are an incredible sales tool for rollover comparisons or stand-alone client presentations.

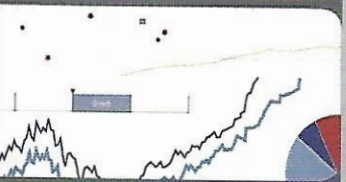
Qualify to Have Securities Licensing Paid For:

\$30/month



Morningstar Financial Analysis Software:

\$625/month



The Ultimate Business Support System is a cost-effective approach to give you everything you need to run a successful business!

¹ Actual savings depend upon specific carrier and plan selected. Must register through POL. See POL > Field Support > Field Technology for general discount program information. Contact carriers directly for the latest discount offers. Cell phone carrier discounts are not available in Canada. ² In Canada, the IBA fee (including applicable tax) is \$103.95. A Full-Service subscription to Primerica Online is required to access the full range of information and functionality of Primerica Online. Initially, it costs \$25 per month for reps in the U.S. and \$28 per month for reps in Canada. ³ Look on POL under the Getting Licensed link for more information on what you need to do to take advantage of this benefit. ⁴ Must be securities licensed to use Morningstar financial analysis software. ⁵ Retail Value figures are approximate and may vary between jurisdictions and service providers.

Primerica Online can be accessed without charge to see limited information, e.g., compensation and compliance information. Ask your RVP for details.

A SIMPLE BUSINESS PLAN!

FOUR THINGS TO DO!!

FOUR PHASES OF SUCCESS!!!

(REMEMBER - BE COACHABLE)

PHASE I (NEW TEAMMATES & REP'S): **LEARN** HOW TO:

1) TALK

SET APPTS.
GIVE WINNING
PRESENTATION

2) HIRE

COMPANY
CONCEPT
COMPENSATION
COMMITMENT

3) HELP

CRUSADE
MAKE MONEY

4) BUILD MARKETS

PERSONAL
NEW RECRUITS
CLIENTS
PROSPECTING

PHASE II (PFA'S & DISTRICT LEADERS): **DO** 1,2,3,4

Practice what you were taught in the field training process

PHASE III (DISTRICT, DIVISION LEADERS, RL'S & RVP'S): **TEACH**

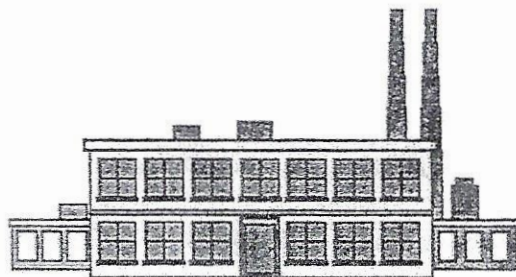
Teach your Teammates how to **TALK, HIRE, HELP & BUILD MARKETS**.

PHASE IV (Developing Leadership):

TEACH OTHERS HOW TO TEACH OTHERS ...

How to **TALK, HIRE, HELP & BUILD MARKETS**

MASTER THIS AND THE BALL GAME IS OVER!!!



BUILD YOURSELF AN RVP FACTORY

GAMEPLAN FOR GREATNESS

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**SETTING
APPOINTMENTS
AND
PROSPECTING**

Memory Jogger

Who comes to mind?

- Co-worker
- Boss
- Partner
- Janitor
- Security guard
- Delivery person
- Administrative staff
- Customer
- Parking attendant
- Landscaper
- Coffee shop
- Personnel manager
- Salespeople
- Boss' boss
- Lunch with
- Competition
- Repair person
- Copier person
- Complainers
- Inspector
- Credit Union/banker
- Fired-up male
- Fired-up female
- Federal Express
- U.P.S.
- Delivers mail
- Lost job
- Will be laid off
- Job hunters
- Dislikes job
- Missed promotion
- Most likable
- Needs part-time job
- Engineer
- New employee
- Time keeper
- Operator
- Payroll
- Contractor
- Mover & shaker
- Preacher
- Nurse
- Dentist
- Doctor
- Principal
- Teacher
- Coach
- Gym
- Therapist
- Hairdresser
- Carpenter
- Mechanic
- Car salesperson
- Gas station
- Police officer
- Painter
- Roofer
- Book store
- Dept. store
- Grocery store
- Convenience store
- Waitress/waiter
- Chef
- Cashier
- Dishwasher
- Hardware store
- Truck driver
- Pharmacist
- Flower shop
- Health spa
- Fast food restaurants
- Toy store
- Dry cleaner
- Student
- Repair person
- Movie rental
- Theater
- Realtor
- Office supplies
- Pizza delivery
- Phone installer
- Pest control
- Bowl with
- Hunt with
- Golf with
- Fish with
- Tennis with
- Ski with
- Soccer with
- Baseball with
- Softball with
- Football with
- Bike with
- Racquetball with
- Swim with
- Jog with
- Firefighter
- Scout leader
- Barber
- Auctioneer
- Photographer
- Guidance counselor
- Musician
- Sister-in-law
- Brother-in-law
- Father-in-law
- Mother-in-law
- Brother
- Sister
- Father
- Mother
- Cousin
- Aunt
- Uncle
- Nephew
- Niece
- Best friend
- Farmer
- Military
- Babysitter
- Sitter's parents
- Neighbors
- Best man
- Maid of honor
- Bartender
- Bridesmaids
- Ushers
- Groomsmen
- Singers
- Plumber
- Plays bridge
- Plays bingo
- Plays poker
- Church
- Plays pool
- Carpool
- Yoga
- PTA
- Hometown
- School reunion
- College annuals
- Optimist
- Eat out with
- Dancing with
- Daycare center
- Park
- From out-of-state
- From out-of-province
- Has a truck
- Plays instrument
- Lifts weights
- Beard
- Little League
- YMCA
- Apt. manager
- Ambitious
- Outgoing
- Enthusiastic
- Trustworthy
- Hard-worker
- Chiropractor
- Nice smile
- Works nights
- Quit smoking
- SCUBA diver
- College professor
- In management
- Does odd jobs
- Works second job
- Mortgage broker

Remember, the people who need your help the most will:

- Be married
- Have kids
- Be homeowners
- Be age 25-55
- Be employed (\$25k+)

- The best leader, manager, friend
- The most successful salesperson, teacher, coach
- The most enthusiastic, ambitious, money motivated

- People who are married/single parent with young children
- People who have a good job, home and car, but want more
- People who are highly motivated and will work hard for their dreams

[illegible]

*Profile : BF - Best Friend M - Mom DA - Dad B - Brother S - Sister SO - Son D- Daughter
 U- Uncle A - Aunt C - Cousin W - Work AQ - Acquaintances CH - Church F - Friend

TRAITS: A = Ambitious C = Competitive E = Enthusiastic
M = Money Motivated S = Great People Skills H = Likes Helping People

- The best leader, manager, friend
- The most successful salesperson, teacher, coach
- The most enthusiastic, ambitious, money motivated

- People who are married/single parent with young children
- People who have a good job, home and car, but want more
- People who are highly motivated and will work hard for their dreams

CONTACT LIST

A "good" prospect list will have at least 100 names at all times. It's not who you know that will make you successful, it's who they know.

MARKET

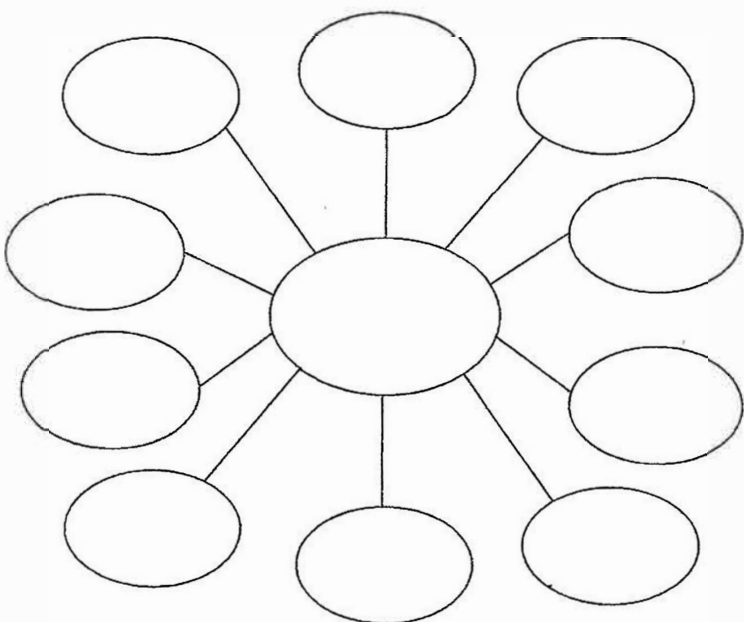
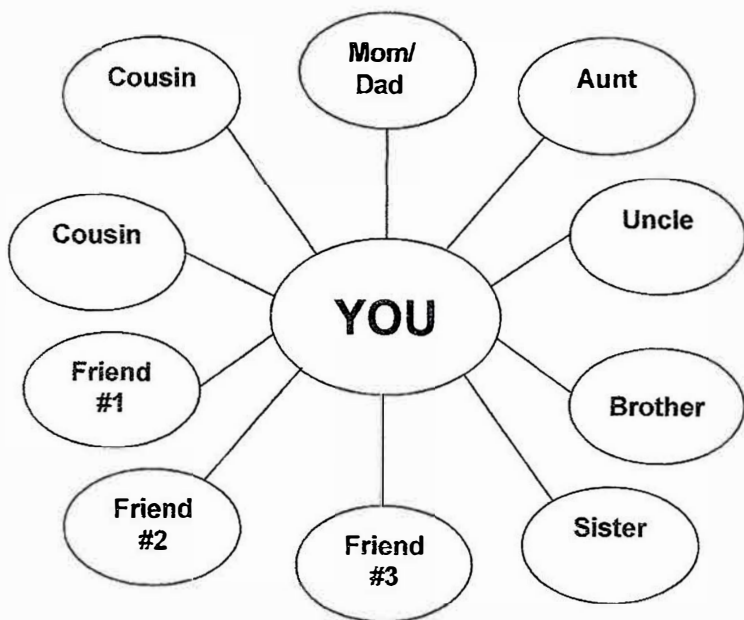
CREDIBILITY

[illegible]

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INTRODUCING THE CRUSADE



Setting Appointments With Your Field Trainer

You will say: "HELLO, (*prospects name*), THIS IS (*new teammate*), I'VE GOT A FRIEND ON THE PHONE THAT I WOULD LIKE YOU TO MEET; his/her name is _____." (The Field Trainer proceeds to introduce him/herself) The new Teammate should not say any more.

Your Upline PFA says the rest:

"HELLO (_____), THE REASON WE CALLED, IS THAT (*New Teammate*) TOOK A LOOK AT A BUSINESS OPPORTUNITY, GOT EXCITED AND DECIDED TO GET INVOLVED ON A PART-TIME BASIS, THE REASON WE'RE CALLING YOU IS TO SET A TIME WHEN WE CAN GET TOGETHER, SHARE IT WITH YOU AND GET YOUR OPINION. WHEN WE GET TOGETHER WE BASICALLY NEED 3 FAVORS; A COLD GLASS OF WATER, FOR YOU TO TAKE YOUR CHECKBOOK AND LOCK IT UP, AND TO KEEP AN OPEN MIND. IS THAT FAIR ENOUGH? WOULD (*suggest a day and time*) BE GOOD FOR YOU?"

"GREAT, PULL OUT YOUR CALENDAR AND PUT ME DOWN FOR _____ am/pm AT _____. SEE YOU THEN."

Remember, the less you say the better!

> If the new prospect calls you back to ask, "What is this about?" Tell them that "it's about saving money, getting out of debt, and there's a business opportunity involved." **Or** "I don't know all the particulars because I am being trained. I do know that I am very excited about the possibilities and my trainer will explain everything to you when we see you _____ at _____."

INTRODUCING THE OPPORTUNITY

NEW RECRUIT SCRIPT

"Hello Bob this is (your name), how have you been? (Wait for answer) That's great!"

"Look, the reason I called is that I have a great business idea and I want to talk to you about being one of my business partners. I need to get together with you within the next 24 to 48 hours for about 30 minutes."

"Is (tomorrow) at (time) or (next day) at (time) better?"

(If they ask what it is about?)

Answer – "That's why I need to get with you in the next 24 to 48 hours! Would _____ at _____ be good?"

DON'T TELL THEM ANYMORE!!!!

TOP 10

BUSINESS PARTNERS

NAME	PHONE #	APPT DATE/TIME	IN or OUT	\$124 PAID
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

BUSINESS OVERVIEW SCRIPTS

THESE ARE THE 1, 2 OR 3 POINTERS ON A NEW RECRUITS PROSPECT LIST THAT YOU FEEL SHOULD BE INVITED TO A BUSINESS BRIEFING INSTEAD OF SPENDING TIME DOING A KT OR STEAMING.

- 1. YOU CAN HAVE THE NEW RECRUIT INTRODUCE YOU OVER THE PHONE BY SAYING:**

HELLO _____ THIS IS _____ I HAVE A FRIEND ON THE PHONE I'D LIKE YOU TO MEET, HIS NAME IS COLUMBUS.

- 2. OR YOU CAN JUST PICK UP THE PHONE AND INTRODUCE YOURSELF:**

THEN YOU SAY:

_____, MY NAME IS COLUMBUS POLLARD AND I AM A SELF EMPLOYED BUSINESS PERSON (OR I AM A BUSINESS OWNER) LOOKING FOR SOME SHARP PEOPLE. YOUR _____ (COWORKER, COUSIN, FRIEND, SISTER, ETC) TELLS ME YOU ARE THE TYPE OF PERSON THAT I AM LOOKING FOR. _____ SAYS THAT YOU ARE A VERY _____ (ENTHUSIASTIC, AMBITIOUS, MOTIVATED, OR WHATEVER QUALITY THEY HAVE) PERSON IS THAT RIGHT? WFA

THE PURPOSE OF THIS CALL IS TO SET A TIME WHEN YOU AND I CAN MEET. _____ CAN YOU USE SOME PART-TIME INCOME (AN EXTRA \$15 TO \$20K A YEAR)? WFA YOU CAN, FANTASTIC!!! CAN YOU FREE UP SOME TIME THURSDAY EVENING AROUND 7PM FOR US TO GET TOGETHER? (WFA) GREAT!!! WE CAN MEET AT MY OFFICE AT 7PM, I WILL BE DOING A BUSINESS BRIEFING THAT YOU CAN SIT IN ON AND AFTER THE BRIEFING YOU AND I CAN GET TOGETHER OVER A CUP OF COFFEE OR TEA AND I WILL ANSWER ANY QUESTIONS THAT YOU HAVE, OKAY.

WHAT IS IT?

I SHOW PEOPLE HOW TO SAVE MONEY AND GET OUT OF DEBT AND BASED ON WHAT _____ SAID ABOUT YOU, YOU WILL BE GREAT IN MY BUSINESS.

Scheduling a Financial Independence Party (FIP)/Dinner

Host Name: _____

Dinner Date _____ Day _____ Time _____

Coaching on Dinner & Financial Game Plan Appointment (Usually 1 week before Dinner)

Date _____ Time _____

HOST CHECK LIST

Set a date & time/within the next 7 – 10 days (2 weeks at the most)

*The Best Time to have a Dinner/Cookout is ANYTIME!!!!

Start Inviting at least 10 – 20 couples; (see script on Invitation Idea to a Dinner)
(1/2 of who you confirm the night before will show, see below)

Plan Meal. Keep it simple. Anything will work if full meal. Examples are:

(Spaghetti, bag of salad, drinks, dessert)

(Hamburgers & hot dogs, chips, drinks, dessert)

(Chicken, potatoes, vegetable, drinks, dessert)

(Lasagna, bag of salad, drinks, dessert)

! Use paper plates, cups, plastic dinnerware so cleanup is quick.

! Desserts should be cake, pie, cheesecake, something other than cookies. Hide the dessert.
(Eat 1st, then short commercial (6 page) then bring in dessert while booking other
cookout/dinners & appointments)

Examples:	# You Invited week before _____	24	12	6
	Called back night before dinner (confirmed) _____	12	6	3
	The number that will show _____	6	3	1

(This is an example of the number of couples to expect. Average of 2000 dinners)

Presenter name: _____

Phone: _____ Cell: _____

Grand Opening Checklist

Complete New Recruit Fast Start Plan (Top 25 Name List - Set Appointments/Grand Opening)

1. Schedule Grand Opening based on Base Shop Event Schedule
2. Create Evite and send it to Top 25 name list along with special guests:

Sample:

Hey family and friends: I have started a new business in the Financial Education arena and I would love to get your support in this new endeavor! I am having an official GRAND OPENING at our office on (Day): _____ Date: _____ @ Time: _____. The address is 4901 Dickens Road, Suite 103, Wilton Park 1, Richmond, VA 23230. This is a special event and seating will be limited. Please RSVP so that I can get an accurate guest count. Someone from our team will call 24-48 hours before the event to confirm your attendance. Refreshments will be served! Doors will open at _____ and the program starts at _____ sharp. I look forward to see you on _____.

3. Call entire guest list before event to confirm that they received Evite along with confirming RSVP attendance.
4. At the Grand Opening - Set the environment with GREAT MUSIC! MIX and MINGLE!
5. Use RVP approved Grand Opening presentation:
Customize title slide with new recruits name and photo
Introduce all recruits who are having Grand Openings
6. Speaker will bring excitement and energy while covering the 5 areas that help is needed.
7. Have New recruits introduce their guests. Speaker will come back up to do "Final Thoughts and Thank You" along with instructing all guests to fill out Grand Opening Questionnaire.
8. MUSIC, MIX and MINGLE:
Gather up Questionnaire forms from all the guests
Answer questions and schedule follow ups

Grand Opening Questionnaire

You were invited by: _____ Your Name: _____

Cell Phone #: _____ Email: _____

Are You Married? Y _____ N _____ Do You Have Children Under Age 25? Y _____ N _____

Select the statements below that best represents your interest level in our business.

- I am interested in becoming an RVP/ Franchisee _____
- I am interested in making part-time income _____
- I am interested in becoming a client _____
- I am interested in helping with referrals _____
- I am not interested _____

Referrals

Who can you think of that's married?

Name _____ Phone _____ Relationship _____

Name _____ Phone _____ Relationship _____

Name _____ Phone _____ Relationship _____

Who can you think of that has children under age 25?

Name _____ Phone _____ Relationship _____

Name _____ Phone _____ Relationship _____

Name _____ Phone _____ Relationship _____

Who can you think of that's ambitious or that's money motivated?

Name _____ Phone _____ Relationship _____

Name _____ Phone _____ Relationship _____

Name _____ Phone _____ Relationship _____

Who can you think of that can use part-time income?

Name _____ Phone _____ Relationship _____

Name _____ Phone _____ Relationship _____

Name _____ Phone _____ Relationship _____

Who can you think of that would be a good RVP/Franchisee?

Name _____ Phone _____ Relationship _____

Name _____ Phone _____ Relationship _____

Name _____ Phone _____ Relationship _____

Follow up date and time _____

GAMEPLAN FOR GREATNESS

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**TOTAL COMMITMENT
IS THE FIRST STEP
TO GREATNESS**

For Your Biggest Dreams To Come True YOU Must Have A PLAN!!!

GOALS AND COMMITMENTS

Three Ways To Achieve Financial Freedom

1

40 YEAR PLAN

Invest \$100 a month at 12% for 40 years and become a Millionaire

2

20 YEAR PLAN

Invest \$1,000 a month at 12% for 20 years and become a Millionaire (\$500 monthly from each spouse/partner)

3

36 Month Plan

Invest your time and buy back some years! Earning \$200K per year with Primerica is equivalent to having a \$4,000,000 investment withdrawing 5% per year

One day ...

When you tell your kids to chase their dreams and make them come true,

They will listen

Because they watched you chase your dreams and make your dreams come true.



Recruits Name: _____
Contact # _____

Today's Date: _____
Field Trainer _____

DRILL DOWN ON YOUR GOALS

Top 10 Goals you want to get accomplished in the next 18 -36 months

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

Top 5 Goals you want to get accomplished first

1. _____	2. _____
3. _____	4. _____
5. _____	

Top 2-3 out of the 5 Goals you want to get done first

1. _____
2. _____
3. _____

What's the #1 most important goal out of these 2-3 goals you want to get accomplished in the next 18-36 months:

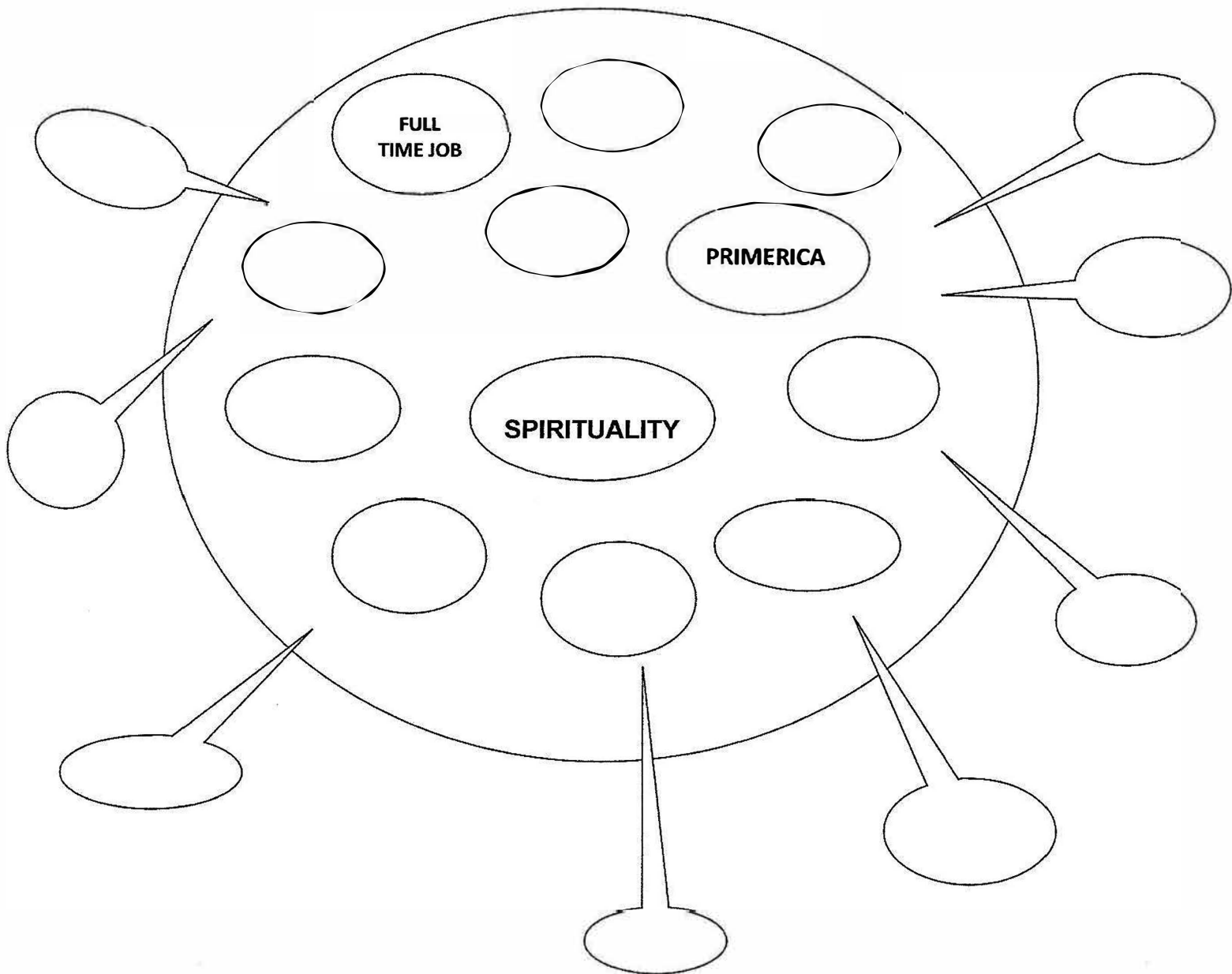
1. _____

What Does It Cost:

F**E****E****T**

Who gets your FEET the next 18 months?

People on the INSIDE of the circle



Over the next 18 – 36 months the people inside your circle should get your **FEET**.

The people or events on the outside of your circle in the next 18 - 36 months

can't get your FOCUS, your EFFORT, your ENERGY or your TIME

because you are learning the business/systems. While you're learning the systems and

building YOUR BUSINESS, you should be able to make \$30,000 - \$50,000.

Goals and Commitments

Training Time

Sun

Mon

Tues

Wed

Thurs

Fri

Sat

Select the nights that you will work to complete Field Training (3x3).
_____ (day of week) night _____ pm (time) is our business overview/training night.

WILL YOU AND ARE YOU COMMITTED TO THIS? YES OR NO
WILL YOU ALLOW YOUR TRAINER TO HOLD YOU ACCOUNTABLE
FOR WHAT YOU SAY AND DO? YES OR NO

Specific Goals

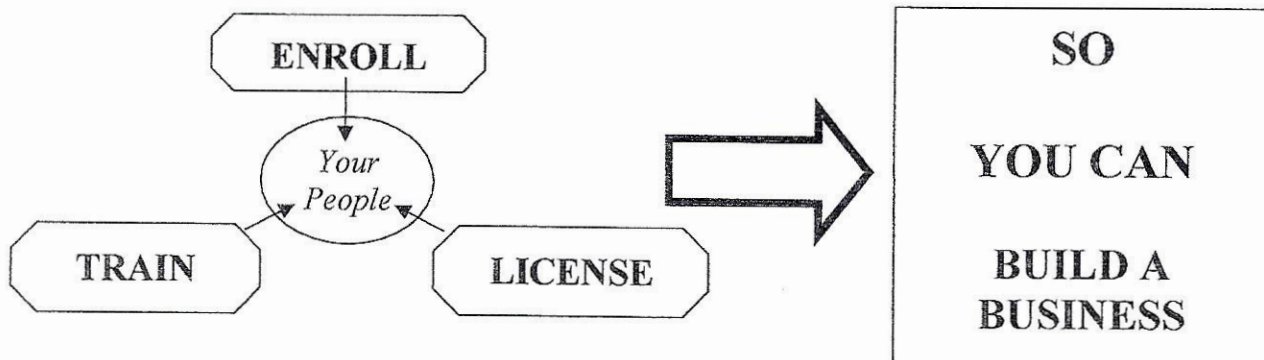
Part-time Income

How much money do you want/need to make each month? \$ _____
What are your compelling reasons for doing the business? (ex: parents, kids)

YOUR CONTRIBUTION

- A► Always Bring People
- B► Be A Student
- C► Cheerlead The System

OUR COMMITMENT TO YOU



Start Date _____ / Recruit Signature _____ End Date _____ / Trainer Signature _____

RVP Signature _____ Date _____

Mark Your Calendar

Now it's time to set your goals and your training schedule. You should plan on attending all meetings during training. Keeping a schedule will help you and your trainer keep track of when you'll be working together each week.

Here are some of the important dates and meetings you and your upline might want to add to your calendar:

- *Opportunity Meeting nights*
- *Base shop training dates*
- *Fast Start School dates*
- *Self-study time*
- *Next insurance exam dates*
- *First appointment dates*
- *Field instruction sales dates*
- *First sales target date*

	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
WEEK 1							
WEEK 2							
WEEK 3							
WEEK 4							
WEEK 5					<div>STAY ENGAGED TO YOUR UPLINE!</div>		
WEEK 6							
					<div>STAY COMMITTED TO YOUR GOALS!</div>		

DISCIPLINE:

Do the things that others won't,
So you can live the life others don't