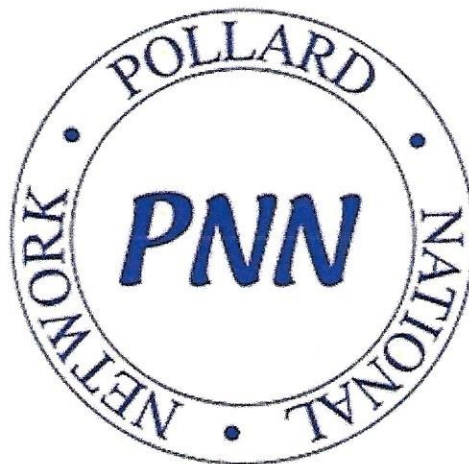


GETTING STARTED WITH



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 (804) 730-1919

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

NOTES

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

**GETTING
STARTED**

FUNDAMENTAL UNDERSTANDING OF PFS

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

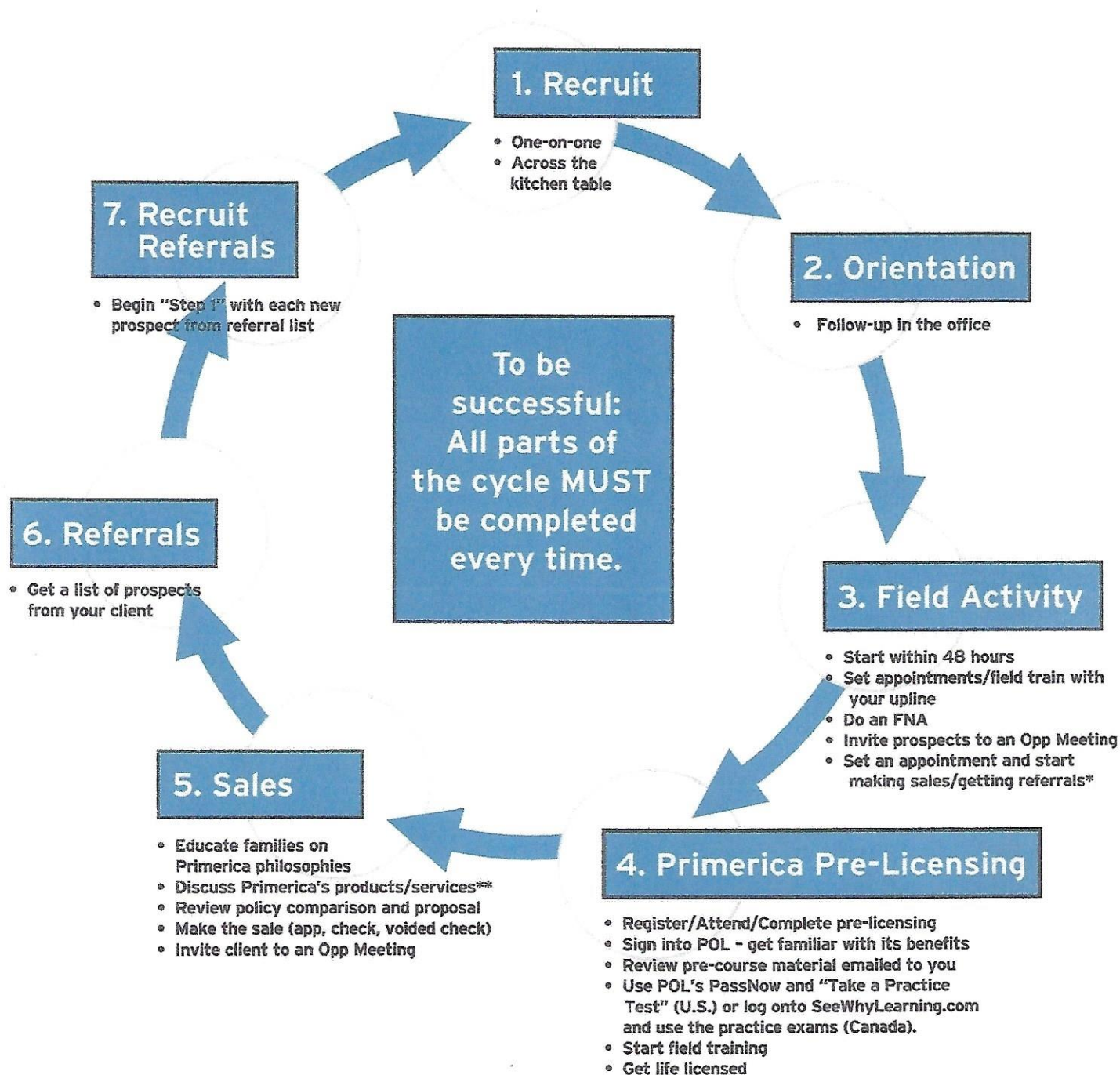
- (Read and Initial) (Initials)
- KEYS:** **REALIZE** That you don't know anything about our business and therefore you must become a student of the business. _____
- BE COACHABLE:** Follow directions, do what your manager says when he/she says it, do what your manager asks, when he/she asks it. Understand 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 section 7.2 of 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

30 DAYS ELIGIBLE DATE

1 RECRUIT

\$1000 IN PREMIUM

WILL GET YOU \$200 IN THE BANK!

Recruit 1	\$1000 in Premium		\$200 BANK
Recruit 2	\$1000 in Premium		\$200 BANK
Recruit 3	\$1000 in Premium		\$200 BANK
Recruit 4	\$1000 in Premium		\$200 BANK
Recruit 5	\$1000 in Premium		\$200 BANK
Recruit 6	\$1000 in Premium		\$200 BANK
Recruit 7	\$1000 in Premium		\$200 BANK
Recruit 8	\$1000 in Premium		\$200 BANK
Recruit 9	\$1000 in Premium		\$200 BANK
Recruit 10	\$1000 in Premium		\$200 BANK

**WHEN YOU PASS THE TEST
INSIDE OF YOUR FIRST 90 DAYS
THEN THE MONEY IS RELEASED!**

*The money is forfeited if not completed inside the first 90 days

THE COMPANY BONUS

If you have completed **3 recruits and 3000 in premium in your first 30 days**, your Home Office Banked Balance would be **\$600!**

GET OFF TO A FAST START

PHASE 1: 30 - 45 DAYS

(You Watch Me Help You Do MINIMUM 2X4/ MAXIMUM 3X6)

You watch me set appointments, give presentations, get commitments, get referrals, 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 (*get licensed and complete 3x6 within 1st 6 weeks*)

PHASE 2: 45 – 90 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/master the presentation, DIME, Theory of Decreasing Responsibility, paperwork completion (paper, computer/iPad), policy delivery, recruiting, setting appointments, handling referrals, STEAMing, Linking, Rule of 72, Cash Flow Quadrant, Prospecting, Beneficiary/Emergency Contacts, Refrigerator A Refrigerator B, 5 Commitments, Goal Setting, Teamwork.

PHASE 3: 90-180 DAYS

FAST TRACK TO SECURITIES LICENSING

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

FAST TRACK TO FIELD TRAINER

you will learn and Must Master....

- | | |
|---------------------------------------|--|
| • How to Help New Recruit Set Appts | • DIME |
| • Qualifying List for New Recruit | • Commitments |
| • Giving Winning Presentation | • Beneficiary/Emergency Contacts |
| • Rule of 72 | • Referrals: STEAM/Linking/Happy Clients |
| • Three Types of Accounts | • Overcoming Objections |
| • Whole Life vs. TERM | • Attitude is Everything |
| • Funny Banking | • Attendance |
| • Theory of Decreasing Responsibility | • Communication |
| • Refrigerator A Refrigerator B | • Paperwork – Paper vs Laptop/iPad |
| • Setting Appointments | • Cash Flow Quadrant |
| • FIPs (Group Presentations) | • 8 5 3 1 |
| • Inviting to Meeting | • Goal Setting |
| • Client Survey | • Teamwork |

PHASE 4: 180 + DAYS

Help New Recruit Get off to Fast Start

90% of your time should be training others.

PROMOTION GUIDELINES

<p>Representative 25% Contract</p> <div style="border: 1px dashed black; padding: 2px; display: inline-block; margin-top: 5px;">1st Month – money submitted</div> <p style="text-align: center;">(YOU)</p> <p style="text-align: center;">Get Life Licensed</p> <hr/> <p>Promote Me to Senior Representative 35% Contract</p> <div style="border: 1px dashed black; padding: 2px; display: inline-block; margin-top: 5px;">2nd Month</div> <p style="text-align: center;">(YOU)</p> <p style="text-align: center;">\$1000 Premium in 1 Month</p> <hr/> <p>Promote Me to District Leader 50% Contract</p> <div style="border: 1px dashed black; padding: 2px; display: inline-block; margin-top: 5px;">1st 6 weeks doing 2x4 or Std 90 days</div> <p style="text-align: center;">(YOU)</p> <p style="text-align: center;">(REC)</p> <p style="text-align: center;">1 Recruit \$2500 Premium in 1 Month</p>	<p style="text-align: center;">Promote Me to Division Leader 60% Contract</p> <div style="border: 1px dashed black; padding: 2px; display: inline-block; margin-top: 5px;">90 days from District Leader Promotion</div> <p style="text-align: center;">(YOU)</p> <p style="text-align: center;">○ ○ ○</p> <p style="text-align: center;">Produce 3 Licensed People (Team) \$5,000 Premium in 1 Month Submit U4 Package</p>
--	--

Promote Me to Regional Leader
70% Contract

90 days from Division Leader Promotion
(6 months in Business)

(YOU)

○ ○ ○ ○ ○

**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 + 10% BONUS + \$15,000 in PRI Stock
Average Income \$115,000 per year

(YOU)

○ ○ ○ ○ ○ ○ ○ ○ ○ ○

**Produce 10 Licensed People (Team)
\$20,000 Premium 1st Month / \$20,000 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 (\$1,000)		Auto & Home		Long Term Care (\$1,500)		Variable Annuity (\$100,000) X 6.5% = \$6500		PFS Investments (\$10,000) X 5% = \$500		Primerica Legal Protection \$35 Start/\$25/ mo (\$310 first year)	ID Theft Defense \$22 start/\$22 per month	Vivint Home Automation
Level	Rate	Comp	Auto	Home	Rate	Comp	Rate	Comp	Rate	Comp	Comp	Comp	Comp
REP	25%	\$250	\$50	\$25	10%	\$150	16.50 %	\$1,073	30%	\$150	\$50	\$39.20	\$200
SRP	35%	\$350	\$52.50	\$27	15.5%	\$232.50	18.60 %	\$1,209	32.50%	\$162.50	\$60	\$47.04	\$250
DIS	50%	\$500	\$55	\$29	20%	\$300	21.75 %	\$1,414	35%	\$175	\$80	\$62.72	\$250
DIV	60%	\$600	\$57.50	\$31	25%	\$375	27%	\$1,755	37.50%	\$187.50	\$90	\$70.56	\$250
REG	70%	\$700	\$60	\$33	30%	\$450	38%	\$2,470	42.50%	\$213	\$100	\$78.40	\$250
RVP	110%	\$1,100	\$85	\$42.50	40%	\$600	57%	\$3,705	62%	\$310	\$125	\$98	\$350

The Ultimate Business Support System

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

FULL SERVICE POL SUBSCRIPTION NOT REQUIRED.

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.

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.

RETAIL VALUE⁵ of Products and Services

Your Own Website:
\$50/month



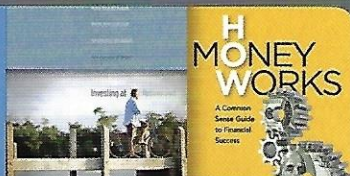
Access to Live and On-demand Online Training:
\$55/month



Business & Competition Reports:
\$75/month



Communication and Credibility Materials
\$250/month



\$25 per month

vs.

\$430 per month

ADDITIONAL VALUE ONCE SECURITIES LICENSED

Savings on Securities Licensing Fees³

Let Primerica help you with that.

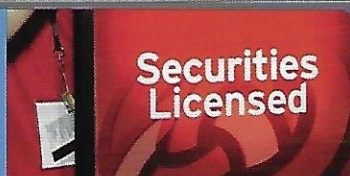
Securities licensing fees can become expensive, but you can position yourself to get your licensing fees pre-paid with your full-service POL subscription.⁴

Morningstar Financial Analysis⁴

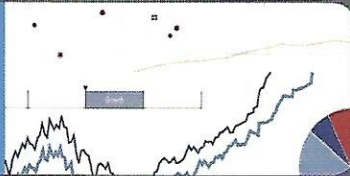
Get access to Morningstar financial analysis software.

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**

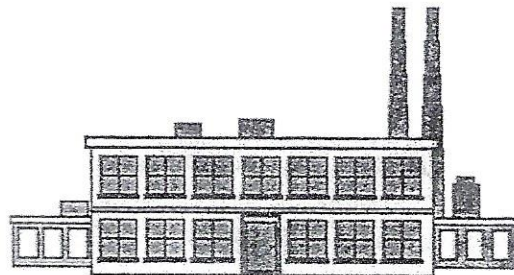
Teach your Teammates how to **TALK, HIRE, HELP & BUILD MARKETS**.

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

"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

**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

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.

NAME (Spouse Name)

CELL#

HOME/ALT#

MARKET

CREDIBILITY

[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
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MARKET

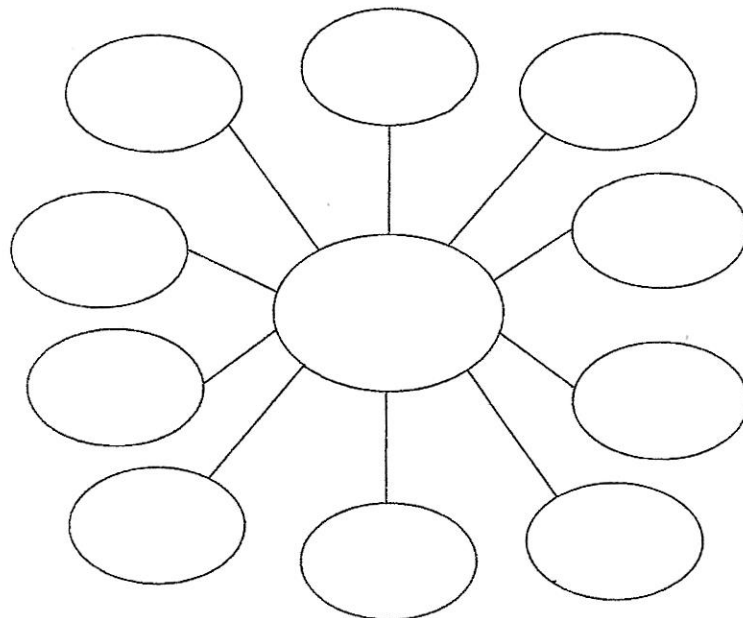
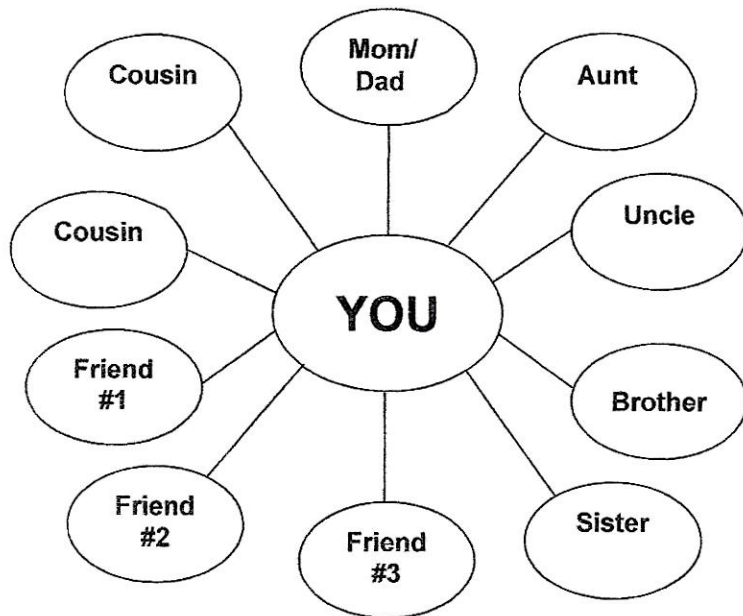
CREDIBILITY

[illegible]

*Profile : BF - Best Friend M - Mom DA - Dad B - Brother S - Sister SO - Son D- Daughter
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TRAITS: A = Ambitious C = Competitive E = Enthusiastic
M = Money Motivated S = Great People Skills H = Likes Helping People

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: _____

Invitation Idea to a Dinner or Cookout

Hey, what are you guys doing _____ night. We are going to have a Dinner/Cookout.
(day of dinner)

I would like to know if _____ can come?
(you & spouse)

After we eat I have this friend who is going to show us some ideas about getting out of debt & becoming Financially Independent. It will be a lot of fun, we will eat at _____ (time). See you then.

Coming After 1 st Call	Coming Night Before	Name	Home Phone	Cell Phone
		1.		
		2.		
		3.		
		4.		
		5.		
		6.		
		7.		
		8.		
		9.		
		10		
		11		
		12.		
		13.		
		14		
		15.		

Call the night before dinner and say:

Hey _____ just wanted to remind you guys about tomorrow night, we didn't want to overcook or undercook, you guys are still coming?

If they say they are not going to be able to, then go ahead & invite them to your next dinner for week later or set one on one appointment that is good for you & them. (Don't worry about upline schedule, someone good will be able to go with you).

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

"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

GOALS AND COMMITMENTS

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

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

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:

FOCUS

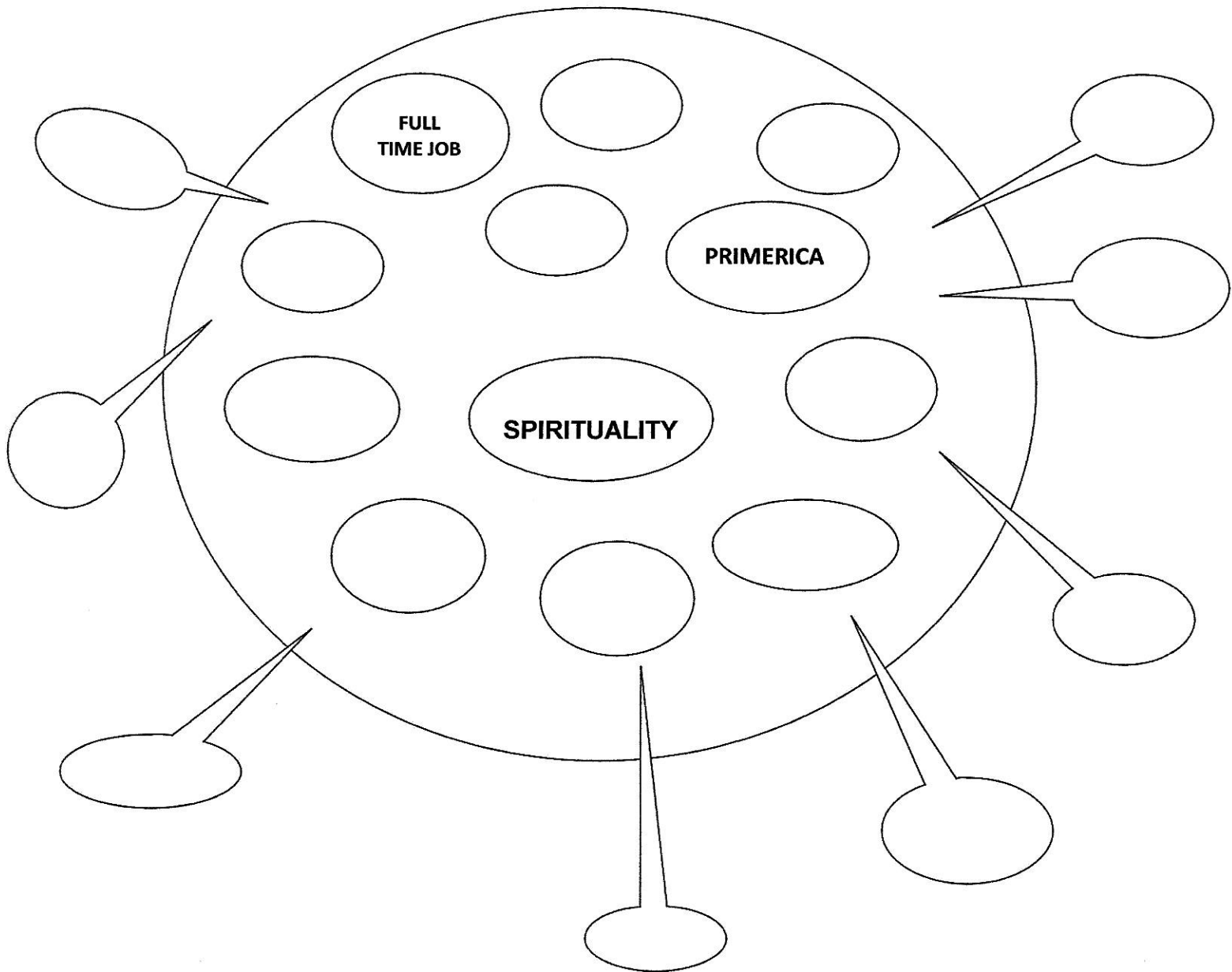
EFFORT

ENERGY

TIME

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 \$25,000 - \$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

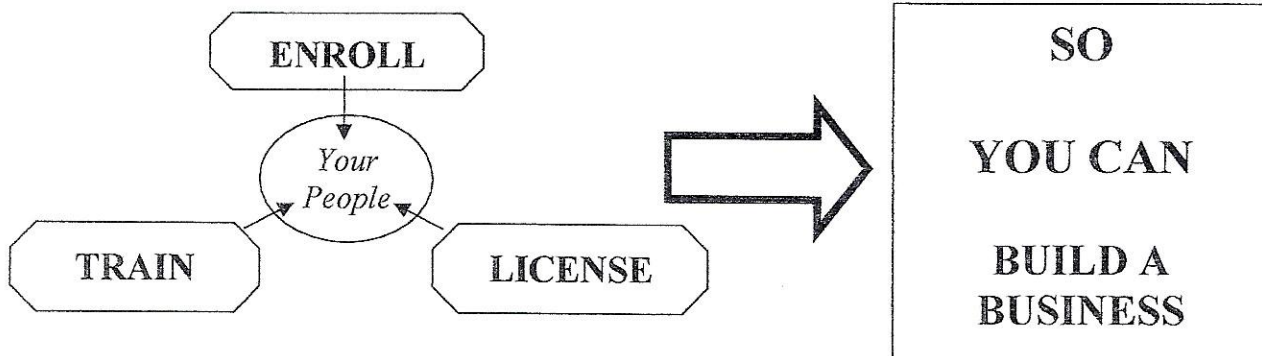
Part-time Income

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 _____