

Name: _____ **Agent #** _____ **Start Date:** _____

MD/EMD: _____

TeamElite / TeamInspiration Agent Requirements

To be signed off by your MD or EMD:

- ☐ Tier 1: Ambassador Training Completed.
- ☐ Tier 2: Intermediate Training Completed.
- ☐ Tier 3: Certified Field Trainer Certification Completed.

Tier 1:

Ambassador Classes:

- Ethor Script
- Zoom Etiquette
- Register / Play New Retirement Video
- Ask 5 Magic Questions
- Take a Snapshot
- Schedule 2nd Apt w/CFT

Ambassador Appts:

- #1 - Prospect Name / Date: _____
- #2 - Prospect Name / Date: _____
- #3 - Prospect Name / Date: _____
- #4 - Prospect Name / Date: _____
- #5 - Prospect Name / Date: _____
- #6 - Prospect Name / Date: _____
- #7 - Prospect Name / Date: _____
- #8 - Prospect Name / Date: _____
- #9 - Prospect Name / Date: _____
- #10 - Prospect Name / Date: _____

Date: _____ *MD/EMD Trainer Signature:* _____

Tier 2:

Intermediate Classes:

- Ethos
- Tevah (Basics)
- ICA/CRM Usage
- Understanding Points/Commission
- Prospecting
- Approach/Contacting
- Objection Handling

Tier 3:

CFT Advance Classes:

- Prospecting
- Recruiting Appt -> ICA
- IUL Illustrations & Case Studies
- Annuity Illustrations & Case Studies
- Client Experience #2
- ITS (E-Trust)
- Debt action plan

Date: _____
MD/EMD Trainer Signature

Date: _____
MD/EMD Trainer Signature